

The Role of the Committee of the local u3a – Cupar & District u3a

Introduction

Hello, this is a call from the Chair of Cupar & District u3a (Cuparu3a) for volunteers to serve as members of the committee.

This note provides a briefing about how Cuparu3a is run by the efforts of volunteers. Cuparu3a is an association of volunteers. Our learning groups are self-managing, in addition the local administration and communications services which support our members and the groups are provided by volunteers.

Cuparu3a depends upon volunteers making voluntary contributions of personal time and energy so that all members benefit.

However, the members of the committee must stand down when their terms of office of current are completed. In order to sustain Cuparu3a we are requesting fresh volunteers to serve on the committee. I am happy to speak with members who are interested taking on a role on the committee.

Please consider becoming a member of the committee.

David Kirk, Chair, Cupar & District u3a

27.02. 2025

1. What is the U3a?

The National u3a

- The National u3a is a nationwide network of learning groups aimed at encouraging retired people to share their knowledge, skills and interests in a friendly environment.
- The Third Age Trust (TAT), a registered charity, is the governing body of u3a and is responsible for strategic policy and statutory governance. There is an Executive Board of Trustees and a Council with regional representatives, Scotland is one of the 12 regions. TAT sets the constitution which all local u3a are required to adopt.
- The National u3a Office provides central news and administration, a secure members data system and public liability insurance cover, and access to on-line educational support resources.

The Intermediate Level – The Regional u3a

- Scotland u3a is formed of all of the Scottish local u3a. By hosting seasonal conferences, holding on-line discussions, arranging a residential summer school, and encouraging active networks of local u3a, Scotland u3a shares intelligence, skills and experience between local u3a.

The Local u3a

As members of Cuparu3a we meet each other in subject learning groups. Each group follows the learning path chosen by its members. A local u3a is a cluster of such self-managing groups. The emphasis is upon informality and respecting fellow-members. Local u3a are territorial, some are

established in cities, but many have been created by local effort in towns and districts. Many local u3a in Scotland are relatively small each with a few hundred local members.

Cupar & District u3a (Cuparu3a) is such a local u3a. This u3a has more than 300 members who are resident across North East Fife. This u3a supports over 40 subject groups which vary in size. For more information see our website <https://cupar.u3asite.uk/>

2. Cuparu3a

A local u3a requires three areas of functional management:

- The development of local subject interest groups
- Local u3a administration and communications (including general reception, member recruitment and subscriptions, the u3a Beacon secure membership records system, and the website and bulletin information)
- A constitutionally mandated committee of the local u3a

Cuparu3a subject interest groups

The purpose of a local u3a is to provide members with opportunities to engage in learning and personal development. Membership of a u3a is open to anyone who is retired from full time work, not by a particular age. This matters, all local u3a require to be welcoming to the recently retired as well as engaging with more elderly members.

The primary functions of the local u3a are member recruitment and the running of inclusive local subject interest groups. These groups operate on a voluntary basis adopting group-based learning practices and engaging in learning for its own sake.

All subject interest groups are formed of u3a members and are self-managing. The members of a learning group nominate a Group Contact as the point of contact between the group and the members of the Cuparu3a committee. (This is essential for recording the members of each group, whether there are vacancies, etc.)

Cuparu3a administration

A local u3a has to maintain essential administrative and information services which support the groups and the members, these services include Beacon, the secure data base of member records of membership and subscriptions, and the provision of information via the web-site, e-mail and by holding regular open-meetings.

These services are maintained by members on a voluntary basis. Although, there is a minimum of bureaucracy, the effort involved can be time-consuming, and therefore is better shared. Volunteers are always appreciated.

Cuparu3a finances

The income of the local u3a is obtained from the membership subscription. TAT sets each local u3a an annual levy which covers the services of the National u3a Office, including member insurance. All office-holders and trustees (members of the committee) of a local u3a are indemnified for public and product liability.

A local u3a is encouraged to set a low annual membership subscription and, after the payment of the levy to TAT, the small amount retained is used to meet the local expenses of the local u3a. The current annual membership subscription is £15, which provides for membership of the Third Age Trust (TAT) as well as the local membership of Cuparu3a.

The financial management of the local u3a is largely concerned with setting the annual membership subscription and receiving members payments and also meeting the small expenses most often associated with local u3a events. Cupar u3a has not sought to be registered as a Scottish charity. The subscriptions and donations would then be eligible for Gift Aid; however our costs are meantime sustainable.

The u3a constitution requires that an annual statement of account is examined independently and is submitted for approval to the local u3a members.

Cuparu3a Website and Email

By establishing a national task group of IT-savvy volunteers across the UK network of local u3a, it has been possible to establish a common website platform which all local u3as use to support the own website. The website manager of Cuparu3a took part as a voluntary member of the task group and as a result she has developed the Cuparu3a website.

The Cuparu3a website provides information on all subject interest groups, promotes u3a events, and provides for members to make contact with committee members and with group contacts.

Email is the mode of communication used by almost all members of the Cuparu3a, group members are encouraged to make use of the email facility provided through the Beacon system.

Cuparu3a Constitutional control

TAT sets the fundamental rules by which a local u3a is governed. The model constitution sets the terms and democratic rules of governance for the running of the local u3a. Each local u3a is required to adopt the constitution.

The governance of the Cuparu3a is carried out by the executive committee of volunteers who take on trustee responsibilities. The members of the committee are elected by the membership at the Annual Audit and General Meeting (AGM). The term of office is one year, but a trustee may be re-appointed for up to three consecutive terms.

The composition and responsibility of the Cuparu3a Committee

There are two types of committee member, office-holders and non-office members.

TAT requires that there are office-holders responsible for specific roles: the Chair, Secretary and Treasurer. These are the traditional roles involved with the calling and conducting of meetings and the recording of decisions, as well as complying with accounting practices. There may also be up to two vice-chairs and a minute secretary.

The financial management of Cuparu3a itself is concerned with receiving membership subscriptions, paying the TAT levy and meeting small expenses. The National u3a Office handles insurance matters.

The roles of non-officer committee members are agreed by the committee. In practice, local u3as have found that their committees are better informed by including a number of named role-holders as committee members. Cuparu3a has provision for several such roles, including a Groups Coordinator; a Membership Secretary; a Website Manager; and an Open Meetings Organiser. The

role-holders are responsible for organising the carrying out of the tasks arising in their area of operation. These are substantial roles and it is expected that the role-holders will look to engage volunteers to help in fulfilling the associated tasks. (Summary descriptions of the roles of the committee of Cuparu3a are listed in Appendix 1.)

All members of the committee are trustees, and as such they are jointly responsible to provide strategic direction, good governance, democratic administration, and financial stability. The role-holders are “hands on” and at the regular meetings of the committee, they report on the matters they are handling, discussing the matters which require decision by the committee. There is a standard and comprehensive policy framework which guides the committee.

3. Taking Stock

Cuparu3a is a local voluntary body, operated on the lines of a charity, and which supports the leisure interests of retired people. The purpose is to provide a social infrastructure in which members will develop their learning interests in an enjoyable and friendly environment.

This briefing has described how this local u3a is managed. The groups, the administrative roles, the web-site, and the committee all depend upon volunteers being willing to take on the responsibilities and tasks involved in the running of Cuparu3a.

The Annual General Meeting is taking place on Wednesday, 11th June. We are inviting members, willing to serve as trustees, to come forward for appointment to the committee.

David Kirk, Chair of Cuparu3a

Appendix 1: Summary descriptions of the roles of the members of the Executive Committee of Cuparu3a

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Role of the Chair

Summary: *The Chair provides leadership, and works closely with the Treasurer and Secretary to ensure that Cupar & District u3a is run effectively. The Chair sets the agenda of meetings and ensures the Committee fulfils the requirements of good governance.*

Role of the Vice Chair

Summary: *The Vice Chair deputises for the Chair in his/her absence and generally provides support for all Committee members.*

The Role of the Treasurer

Summary: *The Treasurer manages the funds of Cupar & District u3a. This involves holding a record of all income and expenditure, reporting updates on income and expenditure to the Committee, managing the bank account and making payments. Before the AGM, the Treasurer prepares the Annual Accounts and arranges for them to be independently examined.*

The Role of the Secretary

Summary: *The Secretary ensures that there is effective communication between all committee members and helps the Chair ensure meetings run smoothly. The Secretary deals with correspondence including that from the u3a National Office and u3a in Scotland, issues agendas and reports for Committee meetings and the AGM, prepares minutes of Committee meetings and the AGM and arranges for them to be approved and documented.*

The Equality & Inclusion Role

Summary: *The Equality and Inclusion role is to promote a supportive culture and, in particular, the normative practice of equality and inclusion by the members of Cupar & District u3a. This includes recording, reporting and attempting to resolve any complaints of discrimination.*

The Role of the Groups Coordinator

Summary: *The Groups Coordinator leads a team of volunteer members who facilitate the setting up of new interest groups and provide support and advice to new and existing group contacts. The Groups Coordinator also keeps the Committee update on relevant developments.*

The Role of the Membership Secretary

Summary: *The Membership Secretary carries out a number of central administrative services including registering membership applications, the up-dating of members and group records, receives payment of subscriptions, and maintains a news bulletin information service of member interest. The Membership Secretary is also responsible for dealing with General Data Protection Regulation (GDPR).*

The Role of the Website Manager

Summary: *The Website Manager leads a team of volunteers, who together maintain the Cupar & District u3a website. There is a broad range of technical and content-related tasks, the combination of which creates and supports the most valuable and user-friendly web-site ensuring both current and prospective members see up to date information on what Cupar & District u3a offers.*

The Role of the Open Meetings Organiser

Summary: *The Open Meetings Organiser arranges and runs a programme of regular open meetings for u3a members, establishes links with local networks of u3as and other voluntary bodies, and the planning of collaborative activities.*

The Role of the Beacon Manager

Summary: *The Beacon Manager is responsible for entering local membership and financial data into the digital data management systems of the national u3a, and for preparing analyses which inform the Committee about changes in key measures.*