Document dated 23rd March 2026, superseding all previous documents.

This document is an outline of setting up a group including the issue of tasters and also refers to tasters of established groups for completeness.

It is not a role description for Group Coordinators and refers also to the responsibilities of Convenors and Professional Tutors

Trialling and Establishing New Groups

Relevant Policies

Monmouth u3a Financial Policy

1. Established groups **without** Professional Tutors will operate on a break-even basis with all members contributing equally to costs eg venue hire, speakers' costs, materials. It is recommended that:
   a. groups work on the basis of 2 months advance payment of fees by members, with payment made by bank transfer in advance
   b. groups maintain a reserve of 2 months costs to cover costs should membership drop unexpectedly.

   Should a greater reserve build up, this can be used for the benefit of that group only, eg to reduce future fees for members or buying additional materials.
   Convenors will be responsible for booking venues, informing the Treasurer of expected invoices, liaising with Treasurer re fee levels and payment mechanisms, informing members re fee payments and reminding all members to pay the required fee promptly.
   Should a group membership fall below the numbers required for the group to be financially viable and the group choses to close, any funds remaining in the account after payment of all invoices belongs to Monmouth u3a.
2. For groups operating **with** Professional Tutors, the members will pay the Tutor direct. The Tutor cannot be a member of any u3a. The Tutor will be responsible for booking and paying for the venue hire and for enabling payments. Tutors, and not Convenors, will be responsible for identifying and chasing late payers. It is the responsibility of the Professional Tutor to ensure that the income from members is sufficient to cover venue hire and Tutor fee.
3. Groups meeting in members' homes incurring no costs do not therefore need to use u3a accounts for payments.

Monmouth u3a New Group Taster Session Policy

A New Group may be trialled should:

- a member suggests an idea and volunteers to lead a New Group (as Convenor);
- an idea be offered eg through New Members' Meeting or Monmouth u3a website;
- a Professional Tutor comes forward willing to offer a New Group.

Potential members of the New Group will be offered a **'New Group Taster Session'** to confirm that the New Group suits them and to ascertain whether the group is financially viable (has the potential to break even), if relevant.

Monmouth u3a maintains a New Groups Fund to support a New Group Taster Session financially by paying for the venue hire if required.

Therefore:

- For a group **not** requiring a Professional Tutor: no payment will be required of those attending. The New Group Taster Session venue hire is paid by the New Groups Fund, and the Taster Session is **free to attendees**. Only when materials are required for the Taster Session will the attendees be asked to cover the costs.
- For a group **with** a Professional Tutor: a payment of **£5 in advance** will be required of those attending the New Group Taster Session to contribute towards the Tutor fee. A total fee should be agreed with the Tutor in advance (see NB below). The New Group Taster Session venue hire is paid by the New Groups Fund:
    - Should too few people attend to break even, the New Groups Fund will underwrite the difference;
    - Should more attend than is required to cover the agreed Tutor cost, the excess shall belong to the New Groups Fund.

N.B. It should be noted that no one should be expected to work for nothing so a fee for a Professional Tutor is justified. However, Monmouth u3a would expect a Tutor to agree a modest fee for the first session as part of establishing their business. Expectations are that the fee should not exceed £30 per hour. While Monmouth u3a is willing to bear some of the risk in order to explore and provide opportunities for members, the Committee does not consider it appropriate to use Monmouth u3a funds to subsidise professional businesses. Should total income from a New Group Taster Session exceed the cost of running the session then excess funds belongs to the Monmouth u3a New Groups Fund.

Non-members of u3a may attend a New Group Taster Session on the same basis as members. Non-members must then join Monmouth u3a if they wish to join the New Group. This does not invalidate u3a insurance.

For the New Group to continue it must be financially viable i.e. the number of committed members must be enough to enable the group to break even if costs are incurred.

For the New Group to continue there must be **at least one** and ideally two members of the New Group who are willing to act as Convenors.

N.B. Convenors are responsible for safe evacuation of members in the case of fire.

N.B. Convenors will maintain accurate membership lists and update venue and timing information on Beacon and webpage information.

GUIDANCE ON SETTING UP A NEW GROUP

Stages to setting up a New Group:

1) **TASTER SESSIONS – NEW GROUPS**
   Setting up New Group Taster Session for all groups

Group Coordinators will:

1) establish that there is interest amongst the membership by sending out notice in the weekly email;
2) create a Group List on Beacon of potential members identified by 'ZY' in front of Group Name to indicate 'pending';
3) if required, identify an appropriate Tutor and ask for insurance documents for activity-based groups;
4) if required, agree a fee with the Tutor for the New Group Taster Session and arrange for invoice to go to Treasurer. Expectations are that up to £30 per hour is reasonable;
5) book a room and arrange for invoice to go to Treasurer for payment by bank transfer;
6) if a venue is new to u3a, perform a Risk Assessment before date of Taster session and ensure all members are familiar with all safety and fire regulations at venues;
7) advise Treasurer of the venue booking and cost and Tutor cost if required;
8) advertise New Group Taster Session via email and What's On pages including cost of £5 for Taster session or cost for material if required;
9) inform attendees to transfer £5 payment into Activities account if required and thereby confirm attendance with confirmed attendees to be noted on list in Beacon;
10) run New Group Taster Session and confirm number of attendees intending to continue.

2) ESTABLISHING THE NEW GROUP

Establishing a New Group with Professional Tutor assuming numbers allow.

Group Coordinators will report the outcome of the New Group Taster session to the Committee, recommending, or not, that the New Group be established as a simple 'For Approval' item on the Committee Meeting Agenda. Once the New Group has been agreed:

Group Coordinators will:

1) agree with Professional Tutor a day, time and venue for New Group. Tutor to book venue;

N.B. Tutors are responsible for booking and paying for venue and for ensuring their group attendees have paid.

2) establish an appropriate fee per attendee with Professional Tutor. Tutor is responsible for collection of fees;
3) identify a team of ideally **TWO** Convenors who are members of u3a and who are active members of the New Group. *N.B. Convenors pay the same fees as all other members;*
4) ensure Convenors have password access and training to use Beacon. Engage with Information Manager if required.

Group Convenors will:

5) arrange for Information Manager to move Group List to main Beacon list by removing 'ZY' prefix;
6) update Group membership, removing those not continuing, and input schedule information on Beacon;
7) ensure all Group members are now paid-up members of Monmouth u3a;
8) request permission to pass contact details from members to Tutor;
9) ensure Tutor provides payment details to all members and monitors payment; Convenors are **not** responsible for debt chasing on behalf of the Tutor;
10) engage with Web Support to create a webpage including Convenor contact and day/date/time/venue/cost of sessions;
11) provide text for webpage and keep it up to date;
12) maintain an accurate membership list including a waiting list if required;
13) if a new venue is used ensure that a risk assessment has been done
14) ensure members are familiar with all safety and fire regulations at the venue;

15) take responsibility for reminding members of fire evacuation processes at all meetings.

3) Establishing a New Group without a Professional Tutor assuming numbers allow.

Group Coordinators will report the outcome of the New Group Taster session to the Committee, recommending, or not, that the New Group be established as a simple 'For Approval' item on the Committee Meeting Agenda. Once the New Group has been agreed:

The Group Coordinators will:

1) identify a team of ideally **TWO** Convenors who are members of u3a and who are active members of the New Group. *N.B. Convenors pay the same fees as all other members*;
2) ensure Convenors have password access and training to use Beacon. Engage with Information Manager if required.

Group Convenors will:

1) arrange for Information Manager to move Group List to main Beacon list by removing 'ZY' prefix;
2) update Group membership, removing those not continuing, and input schedule information on Beacon;
3) ensure all group members are now paid-up members of Monmouth u3a
4) identify if a hired venue is required and identify cost;
5) if a venue is to be hired or other costs incurred, then Convenors will liaise with Treasurer to establish an appropriate fee per attendee and account details to be used to pay preferably by bank transfer or alternatively cheque (no cash payments);
6) book venue and advise Treasurer of cost and details for fee payment;
7) advise venue that invoices are to be sent to the Treasurer;
8) if relevant inform members of payment details (provided by Treasurer) and that fees are payable in advance for two months' sessions of group;
9) keep records of what has been hired and when to be ready to check and approve venue hire invoices for payment by Treasurer;
10) engage with Web Support to create webpage including Convenor contact and day/date/time/venue/cost of sessions;
11) provide text for webpage and keep it up to date;
12) maintain an accurate membership list including a waiting list if required;
13) take responsibility for ensuring all group members pay the fees due;

14) if a new venue is used ensure that a risk assessment has been done ;
15) ensure group members are familiar with all safety and fire regulations at the venue;

16) take responsibility for reminding members of fire evacuation processes at all meetings.

EXISTING GROUPS – TASTER SESSIONS

Taster Sessions for Members Joining Existing Groups

All Monmouth u3a members can have a **single, obligation-free** Taster Session with any group where there is space available. To undertake a Taster Session, the member will contact the Convenor to establish if there is space available and arrange to join a session. The member will **pay the same fee** as all other members for that single session. The joining member will pay for the remaining sessions in the 'term' pro rata in advance by bank transfer before joining the group.

Non-members of Monmouth u3a can have up to **three different**, **obligation-free** Taster Sessions of any three groups where there are spaces available before joining Monmouth u3a. TAT Insurance remains valid for these single events. To undertake a Taster Session, the non-member will contact the Convenor to establish that there is space available and arrange to join a session. The non-member will **pay the same fee** as all other members for that single session. Should the non-member wish to continue, then they must join Monmouth u3a before joining the group. The joining member will pay for the remaining sessions in the 'term' pro rata in advance by bank transfer before joining the group.