Setting up a U3A

First Steps

Has your group decided to start a new U3A? If so, we are happy to help you with your first steps.

The following will give you some information to help you get started.

Your first step will be to hold a Public Meeting to gauge the interest in your community. If you

cannot arouse public interest, there is little point in proceeding any further. Some suggested steps

towards holding your Public Meeting:

A good place to start is at your Local Council, as they will often help with publicity and a venue

at little or no cost. The best venue is one that is easily accessible both by public transport, and

with convenient car parking.

Publicity is all-important. You must make sure that the local community is aware of the proposed

formation, and your local library, local newspaper(s), local radio, and local television are good

options for publicity. Local businesses and community organisations may also be prepared to

display your posters to advertise the Public Meeting. Don't forget to talk about your intentions to

anybody and everybody in your community who will listen. For ideas and suggestions on how to

promote your U3A, we suggest you download the promotional guide from the Network

Queensland website: www.u3aqld.org.au - You just cannot have too much publicity.

Your first meeting

The Network committee will assist you to organise this meeting and can provide a speaker to

explain what U3A is about. Presentations by other U3A members could demonstrate possible

class activities. For the Public Meeting itself, you must organise it well so that it will run smoothly.

Things to consider are:

1. Explain clearly what your aims are.

2. Arrange a speaker from another U3A who can talk about the aims, objectives, and

operations of a U3A. Try to find one who is reasonably close to your community.

3. Elect a Steering Committee from those who attend the meeting and arrange for them to

start meeting regularly soon after the meeting.

4. Record names and addresses of all persons attending who show interest in joining, and if feasible sign up as many as possible, both to capture the moment, and to give the fledgling body some income, once the committee has met to set a membership fee for the first year.

5. Prime objectives of the Steering Committee should be to organise a few courses, talks or activities to start as soon as possible, and suitable venues for them, so that the initial impetus is not lost. Your local Council, local schools and churches are the best places to start looking for venues, as both control suitable venues that are often under-utilised or unused.

Getting up and running

With your Public Meeting behind you, and confident that you have sufficient support for a potential viable membership, you must start making the decisions that will shape your U3A. Involve as many people as possible in the decision-making. The more volunteer workers you can attract from your membership, the better placed your U3A will be for development as they will quickly appreciate that it IS a self-help organisation, and they will get more out of it by putting more into it.

Before you go any further, you now need to call a General Meeting of members so that they can democratically elect your first formal Committee. You will need to call for nominations for executive positions:

- President,
- Vice-President,
- Secretary, and
- Treasurer

You will also need a number of general Committee members (and at least one) who may agree to take on certain roles to help your U3A function, e.g., a Programme Co-Ordinator, a Membership Secretary, Technical advisor etc.

Because this is the first election of officers, and some people are already running the Steering Committee, it is quite likely the newly elected Committee will be the same as the existing Steering Committee, but it does not have to be. The important issue is that the Committee must be democratically elected from among the membership. Remember that you must not only do things correctly but must be seen to be doing so.

Be meticulous in your dealings, both with your members and with the general public.

Insurance

An issue that your committee must address very early, is one of insurance. Our society is becoming increasingly litigious, and your U3A and its members must be protected by insurance that, at the least, covers public liability, directors, tutors, volunteers, and a small accident cover for volunteers. In WA, most groups are affiliated with the NSW U3A Network who have negotiated a discounted fee with AON and Certificates of currency can be accessed at

https://nsw.u3anet.org.au/insurance_services/

Constitution

A very important decision to be made now is the structure of your U3A. Try and draft a Constitution as soon as you can so everyone knows the Rules & By-laws, so avoiding confusion.

A copy of Model Rules for associations can be downloaded from the WA Commerce website:

https://www.commerce.wa.gov.au/sites/default/files/atoms/files/draftmodelrules1jul16.docx

The advantages of this are that it will be approved earlier and that your application for Incorporation should proceed more smoothly. Many U3As have already done this, so seek help & advice from a nearby group.

Remember that the more rules and by-laws you adopt, the greater the restrictions you will be placing on your membership in the future.

It pays to be cautious here, and to adopt the minimum necessary to function.

Incorporation

We strongly advise that your U3A become Incorporated under the Associations Incorporation Act.

This will involve payment of a small fee, but it does protect your committee members and your organisation. If you decide to incorporate, the Network may have funds to assist with this procedure and can provide further advice

Governance

Good governance ensures:

- compliance with law and regulation
- that an organisation is well run and efficient
- that problems are identified early and dealt with appropriately
- the preservation of the reputation and integrity of the sector

The basic principles of good governance are fundamental to all organisations – having well defined roles and responsibilities for committee members, a Treasurer with appropriate financial knowledge, accountability and transparency to members and stakeholders.

It is important to have properly documented procedures, policies and record keeping in place to defend any actions against the organisation. Ensure accurate Minutes are kept and finances audited.

What is U3A?

Each U3A is a community organisation which promotes healthy ageing by sharing educational, creative, leisure activities provided by their own members. We ask for no qualification for membership and we award no degrees or diplomas.

History of U3A

The U3A movement had its beginnings in Toulouse, France in 1973. A successful summer school run by the University for retired people, led to the very first Université du Troisième Age. The concept quickly spread throughout France and to other European countries and North America.

The French model centres around universities, relying heavily on their facilities and tuition although there are no exams and costs are kept to a minimum.

The first Australian U3A was established in Melbourne in 1984 and quickly caught on in other communities in Australia. In WA the first were formed following a meeting in 1986 at the University of Western Australia

Australia follows the British model. Rather than relying on traditional universities to provide courses and tutors, members themselves volunteer their skills, knowledge and life experiences to provide classes for members.

So, U3As in Australia are autonomous, managed by the members themselves and the only restriction to the curriculum is the expertise available within the community.

U3A Brand - The Logo and Guidelines for its Use

The Third Age Trust (TAT) is the owner of the U3A Logo which has

been registered by the Trust in Australia and licenced for use in

WA by the Network. Note the 3-cell logo consists of 3 cojoined squares so the ratio of length to height is always 3 to 1 and should not be altered.

The Third Age Trust has issued a set of guidelines for use of the logo, a copy of which can be provided. These guidelines help ensure that everyone producing promotional or public facing materials for the U3A movement present a consistent vision of our brand to the public by using the same logo, fonts, colours, etc and set the right editorial tone.

The guidelines apply to both physical materials such as letterheads, membership cards, banners, reports or publications and online media such as websites and Facebook pages.

The intention is to provide clear guidance to everyone producing public facing materials for the

U3A movement, including those with little or no knowledge of the U3A brand.

Planning Your Program

You now need to set up a program of courses , talks or activities that the group wishes to pursue your first full term or semester. Most U3As in WA operate on a semester basis with either 2, 3 or 4 semesters a year with activities weekly but frequency is up to the local group.

Whilst a survey of members' needs may identify their interests, most programs are based on the availability of tutors and their particular skills and abilities. Your first priority will always be to identify and recruit volunteers who are prepared to be tutors.

Your committee members will need to accept the responsibility to coordinate the programme, to produce and publish information about the courses, and make this information known to members, as welll as handling enrolments.

Although the principal intent of the U3A movement is a continuation of learning, and thus most activities are directed to this aim; it is also an association of people in the third age of life who see value in meeting in a relaxed and harmonious environment. This can be greatly assisted if you include some other activities that are directed more towards social needs, such as Bushwalking Groups, Choirs, Theatre Parties, Tennis days, Travel Clubs, Dining-out Groups, Coffee & Chat mornings, board games etc.

Covering your expenses

Each U3A will have expenses that must be covered. Your expenses may include but not be restricted to:

- Rental of premises where you hold your courses

- Public Liability & General Insurance - U3A groups may join the Network Insurance scheme.
  This is encouraged but is not obligatory

- Purchase and maintenance of equipment

- Stationery, printing and postage for newsletters, programs and other publications

- Advertising

- Internet, including access and publishing a web site

Sponsorship

Some U3As are offered, or have sought, sponsorship by a larger body (university, local council, local business, etc.). Your committee will need to consider the implications of sponsorship very

carefully. Each U3A is autonomous and has the right to determine its own policy, but sponsorship can lead to unwelcome, or even illegal, interference by the sponsoring body. By its very nature any U3A will contain people with widely varying backgrounds, wishes & opinions, and all of these should be taken into account when policies are formulated.

Membership Fees

The universal source of U3A funding is from its membership. Most U3As charge fees in one of two ways. In the first, a single annual membership fee is set, and all expenses are met from that fee. The second model usually has a lower annual membership fee, and members are also charged, on a 'user pays' principle, for their attendance at activities, to pay for the costs involved in staging the activity (rent of venue, equipment, consumables, etc.).

Funding

There are a number of opportunities for not-for-profit entities to obtain funding in the form of grants for equipment or events.

The conditions attached to each type of grant may vary, so intending applicant U3As should examine the Fund's requirement against their needs.

Of course, it is very important that a fair membership fee be calculated to suit the needs of your U3A. This will most likely be your main source of revenue and it is important to arrive at a figure that will keep your U3A solvent whilst appearing to be a reasonable amount for your members to pay.

Website

A website is a great way to advertise your U3A and communicate with your members.

You can easily build a web site on Google Sites or similar free sites and it can **cost you nothing** at all, except some of your time.

You don't need a high level of expertise or special software.

Note: A web site will not be quite totally free of cost - You will require a domain name which would cost from $10 per year.

Facebook

https://www.facebook.com/U3ANetworkWA

Facebook is another great way to promote your U3A. Easy to set up and allows information to be seen by your members instantly as long as they are Facebook account holders.

Facebook, used in conjunction with your website, gives you an arsenal of very powerful promotional tools.

U3A Network WA.

Is the State- wide voice for the U3A movement in Western Australia.

The Network represents 10 U3A groups throughout the State, including U3A Online,

The aims of the Network are to:

- Promote the U3A movement in Western Australia

- Facilitate communication between local and national U3A groups

- Provide support for existing U3A groups and for the formation of new groups in WA

- Establish connections with local and state government agencies and with other appropriate groups in the community

Current U3As

U3As currently in Western Australia are located at:

Albany

Armadale   https://www.u3aarmadalewa.org.au/

Bunbury

Geraldton

Mandurah   https://u3amandurah.org.au/

Manjimup

Margaret River https://u3amr.org.au/

Naturaliste   https://u3anaturaliste.com.au/

U3A (UWA) Perth which includes 10 subgroups   https://u3auwa.org/

U3A Online   https://www.u3aonline.org.au/

Network News:

The Network produce a newsletter 3 times a year covering items of interest to state-and

 national groups. Latest editions can be seen here:

https://u3anetworkwa.org.au/newsletter/