U3A

HOBSONS BAY/WILLIAMSTOWN INC

CONVENOR HANDBOOK

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CONVENOR HANDBOOK

WELCOME TO THE ROLE OF CONVENOR

Thank you for being a Convenor, giving your time, sharing your expertise and taking on the responsibilities of the role. The rewards of being a Convenor are many and varied and we hope you find a lot of enjoyment in running your activity.

We are a not-for-profit, volunteer led and run organisation. Our U3A is only as strong and vibrant as its members are willing to make it. As a Convenor you are participating in our very worthwhile vision and mission for existence:

Vision: To promote and celebrate positive ageing.

Mission: U3A Hobsons Bay/Williamstown Inc. supports positive ageing by meeting the needs of the retired and semi-retired members of its community for social interaction and learning opportunities and staying physically active.

PREPARATION

After your course has been approved there are some preparation tasks:

1. Know our *Policies and Procedures* – they provide the framework for how our U3A supports you and how you represent the organisation
2. Know how to use UMAS for your admin tasks (UMAS = *U3A Membership Administration System*)
3. Know how to get help with any issues or problems
4. Follow the steps to run a successful activity

1. Know our Policies and Procedures

These are in place to guide and support all members. Please familiarise yourself with them *before* your first session and refer to them as needed. They can be found on our website, https://u3ahbwilli.org.au/policies-and-procedures/ The most relevant to convenors are:

Privacy

Code of Conduct

Enrolment

Grievance

Risk Management

Incident Report Procedure (a printable *Incident Report Form* is located here)

COVID Safety

Expenditure Procedure

2. Know how to use UMAS to:

2.1   get an enrolment List

2.2   find your participants' contact and emergency contact details

2.3   print the Attendance List

2.4   keep in touch with changes in enrolments and wait lists

2.5   send emails to your participants

For instructions on each operation, refer to the **FAQs for Convenors** on the website, https://u3ahbwilli.org.au/faqs-for-convenors/ and/or attend a workshop for convenors.

The full UMAS Guide is also available on the website. *NB: The guide refers to Convenors as "Tutors"*

If you do not use computers email info@u3ahbwilli.org.au or phone our U3A mobile and leave a message to request the information you need.

3. Know how to get help

3.1   Refer to the FAQs on the website
3.2   Email info@u3ahbwilli.org.au with your query and the relevant committee member will respond
3.3   Attend a Convenor Workshop

4. BEFORE YOUR FIRST SESSION

4.1 Know how to access the venue and operate any equipment

Know the access codes and where to get the keys. Learn how to operate the equipment you plan to use. Email info@u3ahbwilli.org.au ahead of time if you require assistance.

4.2: Send a Welcome/Reminder Email

A week or two before your first session send a welcome/reminder email to your members. Details to include: date, time, venue and any specific requirements for your activity, e.g. equipment (see the Appendix for a sample email).

See FAQ: *How do I email all the participants in my activity*

4.3: Print an *Attendance/Absence List* from UMAS

Please mark the Attendance List for each session. The reasons for the Attendance List are:

4.3.1   To Manage Waiting Lists: if participants miss sessions without prior notice to the convenor the convenor should contact the member to ascertain their intentions. The convenor can consider whether to remove the member and give that place to someone on the Waiting List. *NB: Not all activities require prior notice of attendance /absence*

4.3.2   The List is also a means of confirming that a member was present in the unlikely event that an insurance claim is made. The List can be disposed of after your course is completed.

4.3.3 ATTENDANCE/ABSENCE: Do you want your members to notify you if they will be either attending or absent? Let your members know how you would like them to notify you: via your personal text/email/phone or via Absence Manager in UMAS.

See FAQs: *How do I print out an Attendance Form;*

How do I manage absences in my group

4.4 Print an *Emergency Contacts list* from UMAS

Remember to either print a new list or add new details whenever another member joins your activity.

NB: *Some convenors might prefer to use their phones to access the Emergency Contacts list to ensure they always see the current version.*

See FAQ: *How do I print out members' emergency contacts*

4.1 Print an Incident Report form from the website

If there is an incident or accident it is easier to fill out the form immediately with assistance from witnesses, than to do it later, so have it handy at all sessions.

The *Incident Report Procedure and Form* can be printed from the website
https://u3ahbwilli.org.au/policies-and-procedures/

See FAQ: *What should I do if there is an incident or accident during my activity?*

RUNNING YOUR ACTIVITY

5. THE FIRST SESSION

NB: *the following information is designed around long activities, ie: ones that run for more than a few sessions, where the building of social connections is as important as the content of the activity (refer to our Mission). Adapt the following information according to the type of activity and number of sessions.*

Introductions: how do you want the members to introduce themselves? Some people will say very little, some might go on for a long time. How will you give instructions/model what you want and manage the process?

Mark the Attendance List

Set The Ground Rules:

- Our Policies are very relevant here: Code of Conduct (basically – respectful interactions), Privacy, Risk Management, Grievance, etc.
- Explain up front your expectations and how you are going to run the sessions. Your expectations might include things like: do you want to be notified each session if members can (or can't) attend; turn-taking in discussions/not talking over each other; roster for room/equipment preparation; will you have a tea-break; who will supply food/milk; other considerations…

The business of the activity: How you run the activity and how you allow for input and feedback depends very much on the type of activity.

Finish: foreshadow the next session; thank members for attending; do you need help to pack up; finish on time

6. Subsequent Sessions

Repeat the introductions, ground rules etc. as needed and whenever additional members join.

Sharing contact details: This can contribute to enhancing social connectedness. Once the members are comfortable with each other you can suggest that they share their contact details. Consent must be given.

Social events, e.g. an occasional lunch at a nearby café after a session, can also contribute to making social connections

CONVENING SHORT COURSES and ONE-OFF EVENTS

STEPS 1 - 3: as above

STEP 4: Run the activity – how this is done depends very much on the type of activity.

STEP 5: as above

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OTHER CONVENOR DUTIES

Check the website for the most up-to date answers to your questions: the sections *About Us, Frequently Asked Questions* and *Newsletters* are very helpful

Report venue issues: email Venue Coordinator info@u3ahbwilli.org.au

Attendance (for longer activities built around regular attendance): If enrolled members are not attending regularly and are not informing you, please contact them. From a personal point of view, it is in keeping with our policy of building social connection and will provide valuable feedback to you. From an organisational point of view you might decide to ask the person to withdraw so that the spot can be offered to another member, particularly if there is a Wait List for your activity. If you want assistance in this please contact the Convenor Support team; email info@u3ahbwilli.org.au

Wait List: please check UMAS from time to time to see if you have people on a Wait List. Contact them to let them know about the likelihood of participating and whether there are alternatives. *See the appendix for how to manage your Wait List.*

Keep yourself and your participants informed: share the news from the latest Newsflashes, Newsletters and our Facebook page. Newsflashes and Newsletters are emailed. Newsletters are also posted on the website and a small number are printed for members without electronic connection.

Keep in touch with other convenors and the Convenor Subcommittee: share ideas, get help, make suggestions.

Encourage your participants to consider volunteering with the running of our U3A: could they help with events, join a working bee, become a convenor, join a subcommittee or the Committee

Pass on members' suggestions to the Committee: email info@u3ahbwilli.org.au

Expenses: Refer to the Expenditure Procedure Activities are generally self-funded.

and most of all, have fun

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APPENDIX

1. Sample Welcome/Reminder Email

A week or two before your first session send a welcome/reminder email to your members. Details to include: date, time, venue and any specific requirements for your activity, e.g. equipment

> Dear
>
> You are enrolled in *name of activity* beginning on *date*, at *time* at *venue*.
>
> Please bring: *and/or other specific details*
>
> We look forward to meeting you and sharing a fun time together
>
> *Convenor Name* and *Co-convenor Name*

2. Manage your Wait List:

Convenors decide the maximum number of participants in their activity. When the activity is full, further enrolments go onto the Wait List.

When an enrolled member withdraws, UMAS automatically reduces the maximum number so that the Convenor can decide if/who from the Wait List can join.

Criteria for deciding to admit additional members can include:

- whether it is appropriate for the activity and/or group structure to have people joining part-way through. Some groups, eg: writing groups, develop a shared history where it would be difficult for a new person to be included
- some activities, eg: languages, bike riding, walking, have criteria to be met. The criteria will be noted in the description of the activity. The Convenor might need to assess people on the Wait List for suitability.
- enrolment date/length of time on the waiting list: first on the Wait List is first to join?

If you decide to admit a new person, and they agree and are still available, do the following:

1. Email info@u3ahbwilli.org.au and request that member (Name and Number) be moved from the Wait List to enrolled
2. Once you have received the automatically generated email that the person is now enrolled, you should send a welcome email to the newly admitted member with relevant advice, eg: next meeting date and any special instructions

If there is a Wait List for your activity and you want to increase your maximum number to enable more members to participate, contact the UMAS coordinator on info@u3ahbwilli.org.au

See the FAQs:

How do I check who is waitlisted in my activity?

How do I email those waitlisted in my activity?

How do I add someone on the Wait List to my activity?

3. Know your Activity Code,

for example: 241BRG01 (**24** = the year 2024; 1 = the day of the week ie: Monday; **BRG** = The name of the activity - in this case *Social Bridge*; **01** = a UMAS entry code)