



NILLUMBIK

UNIVERSITY OF THE THIRD AGE

Tutor & Activity Leader Handbook

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Legal: Nillumbik U3A Inc. Registered in Victoria as a 'Not for Profit' Organisation Incorporated Association Reg. No. A0052322C.

The rules of Nillumbik U3A are published on our website and are the 'Model Rules For an Incorporated Association': Associations Incorporation Reform Regulations 2012.

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Also [see our website \(www.nillumbiku3a.org.au/for-tutors\)](http://www.nillumbiku3a.org.au/for-tutors) for:

- Term dates.
- Copyright information.
- Venues, including disabled access.
- Incident/accident form.
- Code of conduct.
- Tutor/Class Leader Application Form.
- Monthly Tutor, Class Leader and Class Rep Bulletins.

1. Introduction

1.1. This handbook

Welcome to all course tutors and activity leaders. This 'Tutor and Activity Leader Handbook' provides you with an overview of Nillumbik U3A, your role and responsibilities, our contact details, guidelines for conducting your class and using office administration volunteers, using class assistants, using copyright materials, well-being and safety, incident reporting and more. We hope that you will find it a useful guide and welcome your feedback to continually improve its usefulness. Throughout this handbook, we will refer to 'tutors' to mean anyone who leads a class or activity scheduled on our class timetables.

More information, including links to useful documents can be found on [the tutor page on our website \(www.nillumbiku3a.org.au/for-tutors\)](http://www.nillumbiku3a.org.au/for-tutors).

1.2. The purposes of Nillumbik University of the Third Age (U3A)

- To provide low-cost classes and activities which encourage continuing social and intellectual interaction for mature-aged persons who are fully or partially retired.
- To operate as a community-based learning co-operative which encourages voluntary participation in all aspects involved in the promotion of healthy ageing in a friendly and enjoyable atmosphere.
- To be a non-profit community organisation in which there is no distinction in terms of its membership between those who teach and those who learn.
- To ensure that learning is pursued without and reference to educational entry levels, qualifications, assessment or awards.
- To liaise with other U3As and similar organisations both in Australia and overseas, and exchange ideas and resources.
- To assist, where appropriate, investigations into the process of ageing, the intellectual, cultural and aesthetic potentialities of older adults, as well as into the conditions and roles of the elderly in our community.

1.3. Our short history

Nillumbik U3A is a self-help, not-for-profit organisation which began in June 2008 when a public meeting was held to gauge interest in such an organisation. A steering committee was formed and in Term 4, 2008 four courses were held as an offshoot of Whittlesea U3A.

In November 2008, Nillumbik U3A was officially launched, and we started our own courses at Hurstbridge in February 2009. Following continued success and interest, a new campus was launched at Eltham in July 2012.

We have grown our membership steadily over the years increasing the number of venues we operate from as well as the variety and number of courses and activities we offer. As of 2019, we had around 650 members. This includes a large body of tutors and activity leaders, administrative and office staff, course coordinators, and a management committee which meets monthly to discuss policy and financial issues, and review operations. Everyone involved is a volunteer. We are funded through member subscriptions.

The U3A Network is an incorporated body that acts as an umbrella and liaison organisation for U3As in Victoria (of which there are around 100). It assists new U3As to get established, runs training courses and negotiates with the State Government on funding.

2. Tutors and activity leaders

Without tutors and activity leaders, there would be no U3A. U3A tutors in general have a passion for their subject and, in the process of sharing their knowledge, often build lasting friendships. In 2020 we have around 60 active tutors and new tutors join throughout the year. Some tutors run year-long courses; others prefer a short course format running from 2 weeks to 10 weeks, or sometimes one-off presentations and workshops.

2.1. Tutor membership of U3A

For insurance purposes, all tutors are required to be current members of Nillumbik U3A and should renew their membership annually either online or through the office.

Most tutors, as well as other volunteers, are financial members of the organisation and often attend classes given by another tutor, and participate in other activities on offer. However, if you do not wish to be a financial member, you can be a non-fee paying member, but you will not be entitled to attend courses. Note that you still need to join or renew each year.

2.2. Possible tutor roles

2.2.1 Teacher or Instructor

This role is often carried out by an experienced, knowledgeable person in a particular skill or content area, e.g. history, chi kung, astronomy or other science, painting, languages, technology skills. However you do not need to be an expert as long as you have an interest in the area and time to plan each week's classes. In addition, the course benefits from some level of adult teaching skill. No formal qualifications are required unless it is felt necessary in some physical activity type courses.

2.2.2 Discussion Group Leader

This role requires a keen interest in the subject area, plus skills in leading a discussion so that people feel challenged but comfortable in being actively involved. It needs the skill of judging where the discussion is going, how to guide it, how long to let it run, how to dampen down dominators and draw in reticent members. Examples of such courses are book clubs, current affairs, art appreciation and armchair travel.

2.2.3 One-off Facilitator

This requires organisational and the ability to select sufficiently stimulating and informative speakers or destinations. For example, classes such as monthly guest speaker, theatre outings, concerts, and winery visits. It may involve the preparation of flyers and material for the monthly bulletin. The facilitator may be the front person to introduce the speaker and guide the group. For excursions it helps if the facilitator has been to the venue beforehand and has an understanding of first aid.

2.2.4 Activity Groups Organiser

This requires organisational and group management skills, but not necessarily any specific subject matter knowledge. For example, card games, bowls, gardening, cooking, line dancing, and walking or hiking.

2.2.5 External Course Coordinator

This requires the coordinator to have organisational, management, marketing skills and perhaps the experience of doing the external course being offered. Examples of such classes include U3A Online, distance education courses, Great Courses DVDs and Open University.

3. Tutor responsibilities

Tutors are the life-blood of the U3A and are our most important volunteers. Your responsibilities include:

be reliable, accountable and committed undertake the agreed program or course responsibly and ethically respect confidentiality request support from class members and the U3A when it is needed; value and support other volunteers be fully aware of safety in particular, evacuation and emergency procedures. Know the relevant policies such as copyright, taking photos and grievance procedures.

3.1. Conducting your class

You have the freedom to develop the content and format of your course in accordance with the approved course proposal. It is expected that classes will be conducted in accordance with adult learning principles, enabling respectful participation by all class members and accommodating a variety of learning styles. In keeping with our basic philosophy you are however asked to refrain from any comments /actions that could be seen as promoting a personal business, ideology, or placing members in a vulnerable situation, e.g. financial, physical, psychological.

3.2. Class cancellations

It is important that you immediately inform all class members and the office if you have to cancel a class, giving as much notice as possible so that we can cancel the room. This is a role that you may enlist a class assistant to perform.

Tutors may also choose to cancel classes in cases of extreme heat or high fire danger. Please ensure that all members are notified in advance.

3.3. Maintaining records

During the term members may enrol, withdraw and record apologies for non-attendance at a particular class or classes.

Each class has a 'class roll', which is a list of our members who are enrolled in that class.

3.3.1 The class roll has multiple purposes

The class roll (aka class attendance list) has various purposes for the tutor:

- To provide a list of people in each class.
- To provide contact details (telephone and email).
- To record attendance numbers at each session.
- To show subscription status (paid up status).
- To show people wait listed.

3.3.2 Marking the roll

Before the start of term, you will be sent a link (<https://goo.gl/IVBS1q>) to your class so you can download and print the class roll. You can download your class list at any time using [this link \(https://goo.gl/IVBS1q\)](https://goo.gl/IVBS1q).

If you have no print facility, the Office can help you with this.

We need to have all rolls marked for attendance week by week either by you or your class rep and handed back to the Office. The suggested manner for marking the roll is:

✓	Present
-	Absent without an apology
A	Absent with an apology
H	On holiday

You or your class rep should contact the member after three unexplained absences in case there is a problem.

Please return roll to the Office at end of term or at the end of shorter series of sessions.

3.3.3 Class enrolments and admitting new members

Most members enrol in year-long and term courses at the end of the previous year. Inevitably, some will drop out. Enrolments will continue in your course either directly by members online or through the office until it is full, and then maintained at full capacity from any waiting list. You will have the name and contact of members on the waiting list and if it is appropriate to admit a new member when a vacancy arises you can ask the first member on the waiting list. The waiting list members are listed in order of registration received for your class.

3.3.4 Room etiquette

Often another class/meeting will follow directly on from yours, potentially changing with new courses each term. Please be considerate and finish teaching by the end of your class time to enable packing up and a smooth transition for the next class/meeting. We endeavour to timetable a changeover time of at least 15 minutes at venues where we have courses immediately following each other. Please be considerate and ensure that you vacate the room and the parking area quickly to avoid congestion.

3.3.5 Room problems

If you have any complaints about your room, please contact the Office in the first instance

3.3.6 Member privacy

It is your responsibility to ensure the privacy and confidentiality of member information. This applies to both personal information shared within the class and contact information provided by the office.

Remember to use BCC when you email your class.

In some classes, members may want to share their phone contact details with other class members. You as tutor, with the agreement of the class, may give out the information or class members can share contact information with others on an individual basis. Office volunteers have been instructed not to give out personal details but instead will pass messages on to tutors to respond to directly.

3.3.7 Backup tutors/leaders

In some instances, such as holidays or illness, you may need to be absent from your class for an extended period. Please discuss with the class participants the option of the course continuing with a back-up tutor/leader or a class monitor. Once decided, ensure that the office has all relevant contact details for your replacement.

3.3.8 Photocopying

The offices of our State MPs in Eltham and Diamond Creek will photocopy reasonable amounts of material for you. Or you can organise your own copies and seek reimbursement of the costs from class participants. To reduce photocopying, tutors may wish to email materials to class members.

3.3.9 Copyright

The Australian Copyright Act governs the making of photocopies or other reproductions of copyrighted material. The Act states that copied materials are to be used for research or study and no other purpose and that the amount copied is in accordance with the copying limits laid down in the Act. These fair use limits are:

A "reasonable portion" - 10% or one chapter of a published literary or dramatic work, One article from an issue of a periodical, More than one article from the same issue of a periodical provided they're not for different research or study.

Refer to [our web page for tutors \(www.nillumbiku3a.org.au/for-tutors\)](http://www.nillumbiku3a.org.au/for-tutors) for the terms of our license which covers copying of printed materials and the playing (but not making copies) of music CDs, DVDs, tapes and videos etc. for educational purposes in classes.

4. Well being and safety issues

4.1. Member identification

Members are provided with Member ID cards, plastic pockets and lanyards and are required to wear these whilst attending classes and other U3A events. We request your support in implementing this policy which has been introduced for health and safety reasons, and to assist in member identification. Please set the right example by wearing your own ID card and discussing the importance of this procedure with your class.

4.2. Medical emergency, injury or accident

In the event of any injury or accident occurring on or about premises which are used for our classes, whether or not the person is a member of Nillumbik U3A, please notify the Office and also complete an Incident/Accident Report Form ([see www.nillumbiku3a.org.au/for-tutors](http://www.nillumbiku3a.org.au/for-tutors)) so that the details are recorded. For serious incidents requiring medical attention, or where a person is unconscious, in severe pain or has unstoppable bleeding, 000 should be called.

4.3. Insurance

Nillumbik U3A has public liability insurance that protects tutors against claims that might be made against them for negligence. The policy only applies to activities that have been approved by the Committee of Nillumbik U3A. As a consequence, if you are contemplating any activity that falls outside the approved Curriculum it is essential that you advise the Course Co-ordinator so that Committee approval is obtained. Any questions you have relating to insurance matters should be directed to the Hon. Secretary.

4.4. Grievance and dispute procedures

If you have difficulties with members in your class, we encourage you to resolve issues informally, however feel free to refer the issue to the course coordinator to discuss the matter in confidence. Examples of class issues leading to a dispute may include: disruptive behaviour, aggressive behaviour, harassment. Read the code of conduct on our website - [see www.nillumbiku3a.org.au/for-tutors](http://www.nillumbiku3a.org.au/for-tutors).

5. Sharing the workload – class assistants / class reps

Although the ultimate responsibility for the successful conduct of classes resides with the tutor, much of the work and many of the functions of a tutor can and should be shared with other class members. Many class members may want to be involved so encourage their assistance. The shared responsibilities can range from joint leadership of the class or providing a backup if you are absent to making class arrangements.

One favoured model is that of a 'class rep', which can help to reduce your workload. The roles of the class rep are a matter for agreement between the tutor and the class rep but could include any or all of:

- Prepare and tidy venue, open, close, turn on/off lights, air conditioning.
- Assist with timing to ensure class finishes on time.
- Remind members of newsletters, upcoming events and important dates.
- Be the contact person for apologies.
- Contact members re class information or changes.
- Mark attendance record; return roll to office at end of term.
- Notify the Office of withdrawals and new members.
- Welcome new members and check their enrolment.
- Photocopying.
- Ensure members wear name tags.
- Report class news to the member monthly bulletin.
- Assist with those needing help with transport.
- Liaise with the Welfare Officer (Bronwyn Porter).
- Technical help with audio/visual equipment.
- Collect monies, etc.

Class reps will receive the same monthly emails as tutors.

If you do appoint a class rep, please notify the Office (office@nillumbiku3a.org.au).

6. End of year rollovers

Many classes continue from year to year. For such classes, 'rolling over' is where current members of a class get priority over others for being in that class the following year. 'Not rolling over' is where current members of a class do not get priority and where enrolments are done on a 'first come, first served' basis.

The issue of roll overs is important because, whilst we have been increasing the number of classes over time, our membership has been increasing faster and, as a result, many of our classes are now full. This limits the opportunities for new members to get into classes. There are some people who pay their membership (a requirement before choosing a course) and then find that they cannot gain access to the courses that interest them. Despite this, the vast majority of courses have traditionally rolled over. This has caused some frustration and angst. This problem clearly exists and has been known about for some time.

In this context, it is agreed that:

- It is individuals that potentially roll over, not whole classes. If a person doesn't want to continue participating then obviously they shouldn't be rolled over. So, any roll overs should only be done after the tutor has spoken to each person individually to check that they want to roll over and the Office needs to be given the names of the people to be rolled over rather than some vague "roll them all over" statement.

- People cannot be rolled over unless they have paid their subs for the following year. So, given that roll overs will be processed on a particular weekend in December, people who want to roll over will need to have paid their subs before that weekend. Once the Office has decided on the weekend, they will need to publicise the date to the membership.
- Roll overs for a particular class should only happen if the tutor wants them to happen.
- Roll overs for a particular class can only be processed if the Office is told about them.
- It is a fundamental principle that, at the end of the day, a tutor has the final say on how they run their class, including roll overs.
- Different classes are different. Some are full, whilst others are not. Some continue year in, year out, whilst others do not. Some have maximum sizes, whilst others do not. Some can potentially be duplicated, whilst others cannot. Some have prerequisites, whilst others do not. Some build on the knowledge gained from the previous year, whilst others do not. So, issues need to be thought through on a class by class basis rather than having blanket rules for all classes.

Over and above this, tutors whose classes are full, or nearly full, should think about this issue and about possible solutions. For example, if we could find a bigger venue, would you be prepared to have a bigger class? Would you potentially be prepared to start a second class? And, yes, would you consider the option of not rolling over automatically, to allow new members an opportunity to join their class and encourage longstanding members to try some new classes?

7. Course coordination

The roles of our course coordinator include:

- Talk to prospective tutors about all aspects of tutoring within the U3A.
- Approve and assist tutors where necessary to develop course proposals.
- Schedule classes - both short, term/yearlong - for the start of each year.
- Schedule short courses offered in subsequent terms.
- Organise tutor meetings and workshops.
- Report to the Committee of Management on a monthly basis.

The Course Coordinator can be contacted by email: coordinator@nillumbiku3a.org.au.

7.1. Course planning and promotion

7.1.1 The U3A Year

Nillumbik U3A operates on a year with 4 terms, each of which starts one week after the Victorian Department of Education school terms. We do not operate on public holidays or outside of the term dates published on our website.

Some classes may continue in term breaks, with Committee approval, particularly those that operate once a month and some that involve an activity not requiring a hired venue.

7.1.2 Planning

When you start, you may be asked to complete a 'Tutor/Class Leader Application Form', outlining the subject of your course and how you propose to run the classes, preferred days and times, session length (usually 1.5 hours), and indications (if needed) of the level of previous knowledge required, as well as other administrative information which informs timetabling, equipment and room bookings. These forms are also available in the office and can be downloaded from our website. The completed form can be submitted to the Course Coordinator throughout the year for short courses starting in term 2, term 3 or term 4. The Course Coordinator will then contact you to discuss your proposal.

7.1.3 Promoting courses

- **Monthly Bulletins:** We publish a monthly Bulletin for all of our members. A paragraph or two which includes the course description will be published for all new classes. Short articles about significant events in your class can also be included. Deadlines for inclusion in the Bulletin are the 28th day of each month.
- **Website:** The website will carry the description of the class once it has been timetabled so that members can select to join.
- **Word of mouth:** If you have vacancies in your class, encourage the participants to bring a friend.

7.2. Financial resources

From time to time, the U3A may be provided with a small amount of funding from the State Government or other sources to be spent on items directly related to course improvement. All materials purchased for class use remain the property of the U3A. You may make a request for equipment and course materials at any time. Send your requests for financial assistance to the Course Coordinator, including a description of the item(s) to be funded and the cost.

If class members need text books that will be written in during the course then these should be purchased by the members as they cannot be reasonably re-used by a later class. Note also that the funds are not used to procure consumables or class supplies which are expected to be charged to the class participants.

8. The U3A Office

8.1. Contacting Office Administration

The Office is located at the Old Eltham Courthouse and is staffed on Mondays and Thursdays from 10am to noon during term.

Emails from tutors are dealt with as promptly as possible: contact office@nillumbiku3a.org.au.

Phone: 0468 300 764.

8.2. Role of Office Administration

- Register membership applications and payments.
- Direct members to available places in classes.
- Enrol members into classes.
- Communicate information from: phone calls, voice messages, emails, enquires in person or by post to tutors as necessary.

- Create and maintain information for class lists from: individual members, tutors, online enrolments, roll overs, adding new members (inform tutors by email of new members joining the class during term) & remove discontinuing members.
- Put potential members in touch with tutors i.e. language tutors, bridge or art, for placement into appropriate classes.
- Provide admin services and assistance to tutors (e.g. photocopying facilities, hard copies of class list, etc).
- Send reminder email of link to class list before each term commences

8.3. Information required from tutors

- Change in tutor contact details.
- Change in class lists:
 - Someone is attending who is not on list.
 - Someone is on list but not attending.
- Cancellation of class - tutor (or class assistant) to let both the participants and the Office and know.
- At end of term (or at the end of shorter series of sessions), your marked class roll should be returned or emailed to the Office (see section 3.3.2).

8.4. Assistance to tutors

If you have any problems contacting enrolled members, accessing/printing class lists or any difficulties at venues (e.g. space, equipment, air conditioning heating etc.), the Office should be able to help.

8.5. Enquiries re joining your class

Please **do not** accept any member or prospective member into your class if they are not on the class list. It is ok for someone to 'try out' your class, but please refer them to the office for enrolment. In some cases, there are wait list member who should get a place first.

9. Applying for grants

9.1. The need for a protocol

From time to time, a number of government and private entities make funds available for community organisations to access as grants. Taking advantage of such grant funding opportunities is an important part of a community organisation's income generation.

The only legal entity within Nillumbik U3A is the U3A association itself. As such, it is the only entity that can legally apply for grants and also the only entity that can legally hold money on members' behalf. In practice, this means that any grant application needs to be approved by (and probably signed by) our Grants Coordinator.

It is important that the application for, and receipt of, grants serve the interests of the whole U3A organisation. The Grants Coordinator is available to assist with applications and advise on any application's fit with the overall U3A operation.

The Grants Coordinator can be contacted by email: grants@nillumbiku3a.org.au.

With the above in mind, the Committee has developed a short protocol for the grant applications' process.

9.2. The grant application protocol

1. Grant applications will need to be reviewed and signed off by the Grants Coordinator, who is a Committee member.
2. Once an individual, tutor or group has formed the intention to apply for a grant, they should inform the Grants Coordinator **at least 3 weeks in advance** of the application deadline that the group wishes to submit a grant application. Information should include the name of the U3A group or program, the source of the potential grant, the overall shape of the materials or services supported by the grant and the scale of the total funds applied for.
3. Whilst grant applications can vary in terms of their requirements or otherwise for signatures, etc, all finalised applications must include the 'signature' of the Grants Coordinator (or other approved representative of the Committee) and the organisation's ABN and bank details must be those of Nillumbik U3A. All funds must be received into the Nillumbik U3A official bank account.

9.3. Disbursement of funds

Funds can be disbursed in in the following ways. Note: money will not be directly transferred in advance to tutors or class reps:

- a. Tutors, class reps or their nominees may purchase the 'approved goods or services'. The 'approved goods or services' are those described in the successful grant application. A copy of the relevant invoice(s), approved by the Grants Coordinator as complying with the terms of the grant, together with the claimant's banking details, should be sent to the Treasurer for reimbursement. Original invoices should be mailed to the Treasurer for auditing purposes. (Nillumbik U3A, PO Box 852, Eltham 3095)
- b. Should needs change, or goods/services not be available, the tutor, class rep or nominee must discuss these changed circumstances with the Grants Co-ordinator for approval before any purchases are made.