



**U3A ACT**

## **GUIDE FOR COURSE LEADERS**

**October 2018**

## U3A ACT - GUIDE FOR COURSE LEADERS

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The U3A was established to provide low-cost educational opportunities for members in a pleasant social environment. Its aim is to foster a wide range of courses, the primary determinant being the willingness of people to offer courses that appeal to U3A members and thus provide learning or other activities of interest to them.

This guide provides background information for course leaders relevant to the U3A ACT environment. If additional information is required or if potential course leaders have any queries, the Courses Sub-Committee (CSC) has established a Course Leaders Assistance Team (CLAT) to answer questions and provide assistance to Course Leaders. They can be contacted by email on [courseleaderassistance@u3acanberra.org.au](mailto:courseleaderassistance@u3acanberra.org.au). All CSC members are listed inside the back page of the Newsletter in accordance with the activity for which they are responsible.

### **Who can be a course leader?**

A course leader can be anyone willing to run a course on a voluntary basis in an area of interest to them. There is no requirement that leaders be members of U3A, though it is a requirement that attendees be members of U3A. Previous experience as an educator or a group leader is not essential but course leaders will need to have qualities to enable them to develop and present lectures or talks to members, or organize and run activities for members.

### **What courses can be run?**

There are many possibilities as to the courses that can be run. Reference to the current online Prospectus will show the range of courses on offer. These are not just lecture-type courses on specific subjects but include discussion groups on current affairs or books, music-based activities, and courses essentially recreational, to highlight a few. There are no particular rules concerning the nature of the courses offered. However, the CSC may discuss with a course leader any proposed course which may involve potentially controversial subjects/activities, to determine its suitability. Potential course leaders are welcome to discuss course possibilities with a member of the CSC should they so wish, prior to finalising a formal course proposal.

Courses can occupy anything from one 2 hour session to weekly sessions lasting for many weeks or even most of the year. Course leaders can set the length and timing of a course to meet their own circumstances.

### **First steps to becoming a course leader**

(Note that all course leaders are asked to comply with U3A policies and practices as set out in the Course Prospectus on the website ([www.u3acanberra.org.au](http://www.u3acanberra.org.au) )

The first step is to submit a Course Proposal form to the CSC. The form requires an outline of the proposed course content, duration, venue, proposed limits on the number of participants, fees applicable to the course, and course pre-requisites such as texts/level of knowledge/skills required. Course Proposal forms are available for online submission or in downloadable form from the U3A website (see the Course Leaders' section of the Courses page). Where possible the CSC would prefer to receive course proposals via online submission or in electronic form (as attachments to email in word format, not PDF) and sent to [courses@u3acanberra.org.au](mailto:courses@u3acanberra.org.au), or alternatively, in hard copy through the Hughes Office. All courses require a proposal to be completed each time the course is presented.

### Developing a Course proposal

The following guidance is provided for course leaders in developing a course proposal:

- **venue:** Course leaders need to think about their venue. Relevant considerations may include location, likely hire costs (if any), and the availability of suitable facilities (e.g. kitchen/audio visual facilities or other essential equipment), parking, accessibility, etc.

Many courses are run in community facilities, clubs church halls etc. We have a list of venues used by U3A and recommend course leaders inspect proposed venues to see if they have the facilities required for their course.

U3A itself has two rooms at the Hughes Community Centre. It also has three rooms in the Cook Community Hub ) and four rooms at the Flynn Community Hub. General enquiries about room sizes and bookings at U3A venues should be directed to [roombookings@u3acanberra.org.au](mailto:roombookings@u3acanberra.org.au) .

Information about potential venues can also be found by checking the current online prospectus or contacting the CSC [-courseleaderassistance@u3acanberra.org.au](mailto:-courseleaderassistance@u3acanberra.org.au) .

### Course operations

Course operations cover taking enrolments, course fees and payments for room rent (U3A venues only), attendance and appointing a Course Treasurer.

- **enrolment procedures:** course leaders are responsible for taking the enrolments for courses. This first point of contact enables members to clarify the nature of the course directly with the leader when seeking to enrol. The leader will know when sufficient enrolments have been received. However, in some situations it may be preferable for a person nominated by the leader to take the enrolments. Course leaders also need to determine matters such as whether waiting lists will be maintained and the process for enrolments (normally 'first in first served').

Regarding enrolments:

- it is advisable to set a date and time (e.g. 8 June after 9am) for the start of enrolments and to strictly adhere to accepting enrolments only from the time and date specified to

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ensure fairness to all. Interested people might ring before that date to ask questions but enrolments **should not be taken** before the date and time specified by the Course Leader.

- normally phone and email enrolments need to be offered to make it fair to all;
- in some situations email only enrolments may be warranted;
- for equity reasons, individual enrolments are required. A member is not permitted to enrol their member friends (family partners excepted); and
- course members must be current financial U3A members, and their membership number requested at the time of enrolment. This can then be recorded on the Enrolment and Attendance forms. Course members should wear their current membership badge at classes

It can be helpful when accepting enrolments by phone to seek an e-mail address as this can be useful in notifying course members of changes to times, venues or other changes to course arrangements, or in providing any course materials. If an email is sent to more than one person at a time, please respect individual privacy by using your own address in the 'To' section of the mail and all other addresses in the 'Bcc' (Blind carbon copy) of the mail.

In order to ensure that members have fair access to courses, leaders are encouraged to take at least 2 new members into continuing courses, to take waiting lists and, desirably, to create what opportunities they can to open their courses up to new enrollees e.g. by adhering to a policy of accepting enrolments on a first-in-first-served basis, even in continuing courses and not carrying whole course enrolments forward from one year to another to the exclusion of prospective new members.

- **course fees:** Course costs must be met by participants. These include room rental costs, refreshments (if any), and any specific costs incurred by the leader in convening the course (such as photocopying, equipment hire, etc). Note that for U3A venues at Hughes Cook and Flynn there are preset room rent fees per person per session. The course proposal should indicate the likely costs involved so that these can be included in the course notice to members.

Similarly, the costs of courses run in rooms in Clubs or other venues, must be met by the participants. This may include (usually modest) membership fees for a Club.

- **appointing a Course Treasurer (mandatory):** All course leaders must appoint a Treasurer, usually a volunteer (or two) from among course participants – the course leader should not assume this role along with presenting the course. Financial matters are solely managed within the class and there is no formal reporting to U3A. However, for courses held at U3A facilities at Hughes, Cook and Flynn there are specific procedures for remitting the rent fees and the record of member payments to the U3A Treasurer. Forms for recording attendance and room rent payments are on the website, at the Course Leaders' section of the Courses page. Please contact the Course Leader Assistance Team - [courseleaderassistance@u3acanberra.org.au](mailto:courseleaderassistance@u3acanberra.org.au) , for assistance.

- **maintaining records of class enrolments, payments, and attendance:** three forms specifically designed for these purposes are available for download from the website. The Enrolment Form is designed for Course Leaders to record enrolments as they are received on Enrolment. The Class Payments Record records payments for rent (if applicable), refreshments, photocopying and other course costs. For courses held at U3A facilities at Hughes, Cook and Flynn rent payments must be deposited in cash or by credit/debit card at the Cook or Hughes office or paid via EFT directly into U3A's bank account, and a copy of the Payments Record returned to the U3A Treasurer or left at the Cook or Hughes office. For other venues, there is no requirement to formally submit the Treasurer's form. The Attendance Record must be maintained each session of the course, and emailed to [chaircsc@u3acanberra.org.au](mailto:chaircsc@u3acanberra.org.au) at the conclusion of the course.
- **obtaining assistance with the running of courses:** course leaders may involve course participants in the running of the course e.g. organizing room seating or setting-up and re-instating a venue to its original set-up; organizing refreshments; and arranging guest speakers.
- **changes from initial course notification/cancellation/postponement of courses:** Any significant variations to the advertised course description or details, cancellation or postponement, or changes to the operative dates should be advised to course members and also to Courses Data Team [coursesdata@u3acanberra.org.au](mailto:coursesdata@u3acanberra.org.au) as soon as possible to enable notification to U3A members as necessary (via the website and the e-Bulletin).
- **casual visitors to courses** (members and non-members): Although membership of U3A is a pre-requisite for participation in available courses, the occasional casual visitor may attend classes at the discretion of the course leader.
- **equipment available to course leaders:** U3A has a variety of audio-visual and other equipment installed at both Hughes, Cook and Flynn, as well as portable equipment (computer/projectors/white boards etc) which is available for loan to course leaders for use in the U3A facilities and/or external venues for their courses (see below).

Course leaders not familiar with the in-built audiovisual equipment at Hughes, Cook and Flynn should take the time to familiarise themselves with the equipment in advance of the first session of the course, using the instructions provided. If there is a problem, assistance can be provided over the phone by the relevant Help Desk whose phone numbers are listed in the relevant U3A offices, or by emailing the Technical Support Team.

Those using U3A equipment away from the storage location are responsible for its collection from U3A and prompt return. For enquiries about available equipment and for equipment bookings the contact is the U3A Equipment Bookings officer (for contact details see the listing on the back of the U3A Newsletter).

### Training and other support available to course leaders

The U3A CSC periodically runs sessions to assist prospective course leaders to gain an appreciation of what is involved. These take the form of an informal presentation by intending leaders of their ideas and also provide an opportunity to ask questions about any aspect of running courses including the use of audio-visual equipment. These are notified in the Newsletter and on the website. Where prospective leaders indicate interest, a follow up course of three sessions can be run, exploring more deeply how to plan and present content, engage learners and deal with class room issues. Some equipment training may be done on a one-to-one basis as convenient. Other assistance and support available include:

- consulting with leaders of similar courses to gain an appreciation of how they run their courses
- with the leader's permission, sitting-in on a session of courses similar to a proposed new course
- discussing issues about planning or running a course with CSC members – [courseleaderassistance@u3acanberra.org.au](mailto:courseleaderassistance@u3acanberra.org.au)
- accessing course resource material available through:
  - (1) U3A Network -NSW Resource Library: <http://courses.u3anet.org.au> (material sent electronically is free of charge – CD of material costs \$6 including postage).
  - (2) U3A Online Inc: [www.u3aonline.org.au](http://www.u3aonline.org.au) (site licenses cost \$20/course – a site license is valid for use of the course material for one year).

### Safety and Wellbeing, insurance, copyright and related legal considerations

- **Safety and Wellbeing:** Course leaders (and course participants) must have due regard to good safety and wellbeing practices with regard to any physical activity they engage in such as setting up rooms, moving equipment, courses involving physical activity, arrangements for refreshments, etc. Any limitations on room loadings and room setups as part of compliance with fire regulations or venue regulations must be strictly adhered to.

Course leaders are asked to be mindful of the safety and wellbeing issues as mentioned and on behalf of U3A help to ensure good practices are followed by all participants. Where an accident to a member arises during a course or at a course venue a report needs to be completed promptly. The Accident Incident Report form, Information Re Safety Sheet and the U3A Safety and Wellbeing Policy are on the website

(<https://www.u3acanberra.org.au/policies.html>) and also available from U3A offices. The committee considers all reports and takes action where a hazard is identified.

- **Insurance:** U3A's Public Liability insurance covers course leaders and Committee members when acting under the aegis of U3A, including when performing in public and at U3A social functions. It covers leaders against public liability for injury or damage – with usual exclusions including negligence, etc. Therefore it is important for leaders to observe good safety and



wellbeing practices in setting up and running their course. Copies of U3A's Certificate of Insurance are requested by some community venues and can be obtained from our Offices at Hughes and Cook or from the Course Leader Assistance Team –

[courseleadersassistance@u3acanberra.org.au](mailto:courseleadersassistance@u3acanberra.org.au) .

When hosting U3A activities in the home, presenters should check their Public Liability cover. It is automatically included in House & Contents insurance, but the experience of the 2003 fires was that many homes were without such insurance. Without this protection, presenters could bear personal financial liability for damages arising from an accident in the home. Even though the likelihood of a serious accident may be small, the potential financial impact – in a worst case may even lead to bankruptcy. As well, having one member personally sue another for damages, even for a lesser amount, is bound to be a distressing and time-consuming affair. The U3A broker advises that members cannot rely upon the insurance policies of U3A ACT in a home setting. The advice from the broker is that the proportion of liability assigned to U3A by the courts for an accident in a private home is unpredictable.

- **Copyright:** Course leaders are required to observe copyright rules. This essentially involves 'fair dealing' with material generated by others. Course leaders need to be very cautious in reproducing multiple copies of copyright material: to comply with the law, this should be limited to short extracts only.
- **Obligations in relation to illness of a course member:** While course leaders are not directly responsible for course members, they should assist (as is reasonably appropriate) any course member who may be hurt or fall ill. If there is any concern about the wellbeing of a member or if they have a fall and cannot get up call an ambulance. Then, ensure the Secretary is advised of all significant incidents by phone or email so that any insurance or other liability issues can be addressed. The Accident Incident Report form is available on the website for this purpose. Guidance in relation to the handling of accidents and illnesses is also publicly displayed in U3A facilities at Hughes, Cook and Flynn.

U3A encourages members to provide at least emergency contact details on the back of their membership cards – this information can be useful in responding an accident or illness situation arising during a course, provided members are wearing their cards.

### Miscellaneous

- **Ground rules for running a course:** It may be wise to establish and have the course members agree to certain ground rules for running a course. The course leader needs to exercise control to enable the course to run smoothly so that the planned material or activity can be completed in a session and in a friendly atmosphere. Thus, for example for a lecture-type course, there may need to be rules about when questions will be taken, about avoiding heated debate between course members, limits on discussion or argument, tea break length, etc with a view to ensuring smooth running of the course for the benefit of all members. It could occur that a course includes as a participant an 'expert or a knowledgeable person' in the subject of the course – these should not be discouraged from attending or providing their

views, but the leader needs to control the situation so that the course is not 'high-jacked' by that person.

- **Collecting fees:** In particular circumstances, course leaders may choose to allow one week before fees are collected to allow course members to make a judgment about whether they wish to continue with the course. This may for example be appropriate for a language course (where a certain starting proficiency is needed) or where an attendee needs to gauge the suitability of joining, say, a current affairs discussion group. As room hire charges are fixed and not based on participant numbers, all course members need to pay for room hire charges. Where a course member advises the course leader that they don't intend to continue with the course room rent charges must be paid for the sessions attended. Two weeks is sufficient for course members to make a judgement about their participation in a course.
- **Handling non-payment of fees/non-membership:** In the unlikely situation a class participant refuses to pay the necessary fees or proves not to be a member of U3A they should be respectfully reminded of their obligations and asked to leave the course. Fees should be paid by week/session 2 of a course. There is no reduction of fees if a participant is going to be absent - the rent of a room remains the same fixed rate regardless of how many people are there.
- **Waiting lists:** Course leaders may opt to maintain a waiting list for oversubscribed courses. For some courses (e.g. current affairs, play reading, or book group) people from the waiting list could be sought to replace members who leave the course during the year. In some circumstances the course leader may be able to offer a repeat course and to offer first places to those on the waiting list.
- **Equipment:** U3A holds a substantial range of equipment. Apart from the built-in audiovisual equipment we have in Cook Rooms 1, 2 and 3 and Hughes Rooms 2 and 3, and Flynn U3A holds a broad range of equipment held mainly in the store rooms at Hughes and Cook which is available for use by U3A course leaders (and members). Equipment can be booked through U3A Equipment Bookings (see the back page of the Newsletter or the Contacts tab on the website) in order to avoid potential clashes.

A short list of some of the items available for loan includes: data projectors; laptop computers; overhead projectors (several); slide projectors; i-Pads; document camera; digital piano); public address systems; screens; lecterns; DVD/VCR player; whiteboards; hi-fi audio equipment; heaters; fans; etc.

- **Dealing with a disruptive course participant:** Fortunately, instances of disruptive course members are rare. But should a course leader encounter a situation in which a particular person is disrupting the class, clearly there is a need to address the situation in fairness to

others. The existence of ground rules agreed by course members at the start of the course may prove helpful in addressing the problem.

Strategies for handling such instances could include:

- reasoning with the person concerned, pointing out that all members have an equal right to contribute to the discussion or activity but are being denied that opportunity by the disruptive person's behavior or actions;
- consulting with other course members on how the issue might best be resolved;
- consulting with the Course Leader Assistance Team – [courseleadersassistance@u3acanberra.org.au](mailto:courseleadersassistance@u3acanberra.org.au) on ways to deal with the situation;
- as a last resort, asking the disruptive member to leave the course.

At no time should the course leader or other class members make physical contact with the disruptive person, as this could be construed as assault. If the person is threatening or becoming aggressive to the leader or other class members then the course may need to be ended that day and class members asked to leave in order to ensure the safety of all.

All instances of disruptive occurrence should be reported to the Chair of the CSC ([chaircsc@u3acanberra.org.au](mailto:chaircsc@u3acanberra.org.au)) as soon as possible.