

Sandbach & District u3a Trustees: documents for meeting on 21 June 2021

Item 4 b) Draft update on fees for members

The Trustees have agreed the following arrangements for September 2021:

1. We will introduce the option of **pre-paying for a block of sessions**.

This will be available for most interest groups.

The Group Leader (GL) will decide whether this is suitable for their interest group and how long a block of sessions is (e.g. a month, a term, a year, etc)

2. The session fee for **non-venue groups** (e.g. Sunday lunch club, Walking Cricket) will remain at 50p per session.

Where members pre-pay the fee will reduce to 40p per session.

3. The session fee for most **venue groups** (e.g. Astronomy, Book Group, Circus Skills, etc) will increase from £1 to £1.20 per session.

Where members pre-pay the fee will reduce to £1 per session.

4. Some groups, such as Needlecraft 1 & 2 and Sewing, have a higher fee than is typical, either because of the length of session or small group size. Fees for these groups will remain at the higher rate.

5. Where groups use visiting paid speakers, such as Gardening and Antiques, there will be an additional fee on top of the usual session fee. The GL will determine the additional fee, based on the speaker's costs.

6. Fees for Bowling groups will remain at £3 for Indoor and £2 for Outdoor Bowling.

7. With the **paid tutor groups** (e.g. Tai Chi, Yoga) the fee is calculated on the basis of the tutor fee, the venue fee and the group size. This is why the fee for paid tutor groups varies.

Pre-payment will normally be expected for these groups to ensure that tutor fees are covered. GLs should contact Paula Reilly Cooper if they feel that there are good reasons why pre-payment is not appropriate for their group.

Details of the pre-payment mechanism will follow in a future update.

Some background to these decisions

A Working Group of five Trustees met three times during January and March 2020 and produced a set of recommendations about fees. The Working Group intended to present its recommendations at the April 2020 Committee meeting. With the first lockdown happening in March 2020 there was little point in discussing fees for groups when groups were unable to meet. A second Working Group met recently and produced a modified set of recommendations which have now been agreed.

In agreeing to these recommendations the Trustees had in mind some additional factors:

- Our membership for 2020-21 has reduced by more than 20%, which significantly reduces our income from membership subscriptions.
- The reduction in membership will result in fewer members attending groups, so we can expect the income from session fees to reduce considerably. Venue costs will not go down even if fewer members attend.

In the last full year before Covid the majority of venue groups ran at a loss. A small increase of 20p per session should be sufficient for us to approximately break even across all of the venue groups.

Fees for these groups will be reviewed in December 2021 to ensure that the new system is working effectively.

There are two main reasons for introducing the pre-payment option.

- In the last full year before Covid more than 30,000 payments were made to GLs for session fees. It is important to find a simpler and more efficient system.
- As a result of the Covid pandemic many members and GLs prefer not to handle cash if it can be avoided.

For many groups pre-payment is appropriate because venue fees have to be paid for the group, regardless of whether an individual member attends each session.

The reduced fee for pre-payment recognises that most members will have less than 100% attendance at their group. If some sessions are missed because of illness, holidays, etc. then the reduced fee will help to compensate for that.

Some interest groups work well on a drop-in basis. For these groups most members will probably prefer to pay for sessions on a drop-in basis, rather than making an advance commitment.

Item 4 c) Session fees for Group Leaders

A statement about session fees for Group Leaders

Arnie Laing contacted me recently, in his role as Trust Volunteer, regarding GLs paying session fees for groups that they lead. He referred to the Third Age Trust principles, which include no payments being allowed to any u3a member for providing services to their u3a. He suggested this means that GLs must be required to pay session fees for groups that they lead.

In my reply to him I said I was inclined to agree with that interpretation and promised to bring the matter to the Committee. Currently in Sandbach u3a we do not require GLs to pay session fees for groups that they lead. I believe that many of them do pay those fees, though we have no accurate information on this.

I've thought long and hard about this because it's clear there is more than one possible interpretation of the Third Age Trust principle. I've requested more background from Paula and Alan, who are the people most directly involved, and discussed this at some length at the regular pre-Committee meeting I hold with the vice chair and secretary. I'm aware of the strength of feeling expressed on this matter at the EGM only a few years ago and recognise that it is still potentially a contentious issue.

Alan expressed the view that requiring GLs to pay session fees for groups that they lead is in effect making them pay to volunteer. I'm now inclined to agree with that view, so please let me explain why I've changed my mind from my initial response to Arnie, using my own professional background as an analogy.

Over the past 40 years I've been to hundreds of science education conferences. If I attend as a conference delegate I expect to pay the conference fee, which covers speaker expenses, venue costs, admin expenses and so on. Sometimes I'm paid to run workshops or seminars, and on those occasions I wouldn't dream of paying the conference fee. At many of the conferences I've run workshops or seminars **as a volunteer**, and as a volunteer I have two choices. If I participate in the rest of the conference and attend some of the other workshops and seminars, then I would expect to pay the conference fee because I'm benefiting from the conference. However If I turn up, run my workshop, then leave immediately, I wouldn't expect to pay the conference fee because I'm not participating as an 'ordinary' delegate.

To me this feels like a good analogy for GL fees. If GLs attend any other interest groups then of course they pay the usual session fees to attend. However if a GL is running a group then in most circumstances they are not participating in the same way as the rest of the group members. The GL for Choir doesn't just turn up to sing with the rest of the group; the GL for Circus Skills doesn't just turn up to juggle with a few balls; the GL for Wine Appreciation doesn't just turn up to have a nice drink with a few friends. Requiring the GL to pay session fees for their own group because they are participating in that group appears to massively under-value the role of the GL in running the group. Whilst there may be benefits to any GL from running their group, such as the social interaction with other group members, I would find it difficult to argue that this constitutes payment to the GL.

My opinion now, after reflection, is that we should **not** require GLs to pay session fees for the groups that they are responsible for (though of course they may choose to pay those fees if they wish) and there is no need to change our current policy.

It is important that the Committee reach a considered view on this, ideally by consensus or by voting if necessary. I (or maybe Linda since she is chairing the meeting) will write a proper reply to Arnie to convey your decision. Please note that the views expressed above are my personal views and have no extra weight because I happen to be Chair at this time.

Stuart Naylor, June 2021

Item 5 Planning for Group Leader briefing on fees

DRAFT FOR GROUP LEADER BRIEFING

Some Q & A about pre-payment of group fees at Sandbach u3a

Q. What happens if some members of a group want to have a pre-payment system and others want to pay each session?

A. In most circumstances the Group Leader will make a decision for the whole group, taking into account the circumstances for that group. However if individual members wish to act differently this shouldn't be a problem. Where most of a group pre-pays, individual members should be able to pay on a drop-in basis. Where most of a group pays on a drop-in basis, individual members should be able to pre-pay. The discount applies to pre-payment only.

Q. Who decides how long the payment period is?

A. The GL decides, taking into account the circumstances for that group. The payment period might be a month, a half term, a term, a year, or any other period that seems suitable for that group.

Q. What happens if a member turns up to the first session for the group and doesn't have enough money with them to pay for the block of sessions?

A. They pay for the block at the next session.

Q. What happens if a member doesn't bring payment for several sessions because they never have enough money with them to pay for the block of sessions?

A. If any member owes fees for a period of two months or more then their membership of Sandbach U3A is automatically suspended (see Constitution, clause 5 iv).

Q. What happens if a GL decides to add on some extra sessions at the end of a block?

A. The GL decides how many extra sessions will be added, calculates the payment for that extra block, and informs group members.

Q. What happens if some sessions have to be cancelled after members of a group have pre-paid?

A. The cancelled sessions will be taken into account as advance payment for the next payment block for that group.

Q. What happens if a member misses some sessions after they have pre-paid for a block of sessions?

A. Nothing. **There is no refund.** The reduced fee for the pre-payment option takes into account that most members will have an attendance of less than 100% and that venue fees have to be paid whether or not that member attends a particular session.

Q. What happens if someone joins a group partway through a block of sessions?

A. GLs use their discretion to decide on a suitable level of pre-payment if a member joins a group partway through a payment period – e.g. charging 50% of the usual fee. This does not mean that existing members of the group who miss some sessions can negotiate a reduced pre-payment fee.

Q. What happens if the GL prefers to run drop-in sessions, where members attend occasionally rather than every session?

A. Pre-payment is probably not a suitable option for that group. The GL should continue to collect fees at each session, though some members may still prefer pre-payment.

Item 6 a) Finance Update

Balances at end of month:

Account Name	Jun-21	May-21	Diff.
NatWest Current Account ^{*1}	£13,139.69	£11,136.38	£2,003.31
NatWest Business Reserve Account	£21,635.50	£21,635.30	£0.20
PayPal	£1,708.93	£411.73	£1,297.20
Cash in hand	£768.00	£66.00	£702.00
Total	£37,252.12	£33,249.41	£4,002.71

^{*1}– Current Account Balance excludes unpresented cheques. There are currently no outstanding cheques.

General Notes

- I'm awaiting the membership invoice from the Third Age Trust (£3.50 per member; circa £4k)
- Membership Subscriptions (£2,140), Paid Tutor Groups (£681) and Regular Groups (£957) account for the majority of the increase in total balances.
- Venue and Tutor costs for May and June have not yet been paid (circa £1k)
- Cash in hand has increased significantly this month as outdoor groups, e.g. Bowls, have re-started

Issues Outstanding

- None

Post Month End update

- On 4th July I transferred £5,000 from the NatWest Current Account into the NatWest Business Reserve Account (Savings Account).

- On 6th July we received the gift aid claim - £1,670.68

Item 8 Update on membership

Item 10 a) Calendar update