



# Course Leaders' Handbook

April 2023

An Introduction for New Course Leaders

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## On being a course leader

U3A Southern Highlands relies entirely on volunteer course leaders, most of whom are members of U3A. Without these volunteers, U3A could not exist. Just as U3A courses – open to all members --have no entry requirements and completion of a course leads to no degree or diploma, course leaders similarly are not required to possess any formal qualification. What is required is knowledge of, and enthusiasm for, the subject chosen, and the wish to share that enthusiasm with others. Some courses are run by two or more course leaders who combine their knowledge and expertise.

If you are thinking of giving a course, browse through the course details for the latest term to see the range of subjects currently being offered.

In many cases, the course will bear little relation to the career expertise or qualifications of the leader, while in others course leaders speak from their experience. The arts, sciences, humanities, languages, hobbies, crafts, sports and general interests are all potential subjects for courses. Your class members will come from a wide range of life and career backgrounds, and no particular educational level can be assumed.

As a course leader, we hope you will find great satisfaction in researching the course content and conveying your love of the subject to others. The Course Coordinators are available to assist you to plan a successful and enjoyable course. Once you have decided that you would like to present a course, contact the Course Coordinator to discuss your proposal. Do this as early as possible, as we plan terms 2-3 months ahead. Contact details are on the website and also in the Wise Owl.

Once confirmed as a course leader, you will be given access to the U3A administrative website which will allow you to track your course enrolments and to contact class members by email.

## Adult learning

Leading a U3A Course is both similar to, and different from, teaching in schools and universities. U3A members are older, more experienced and perhaps wiser than younger students, and they have different needs, expectations and other varied activities in their lives. However, as for younger people, they learn best when their relevant experience is acknowledged and drawn upon; when offered challenge with accompanying carefully judged support; and when given opportunity to discuss and apply what they learn.

Your course is for you to lead as you see fit. In doing that, you will be wise to consider the expectations and experiences of class members. For example, sometimes class members will be able to make valuable contributions to deepen the group's learning experience. In some cases, you may be fortunate enough to have many group members able and willing to share their expertise. On the other hand, when members have little relevant experience or knowledge to draw on, you may need to spend time providing explanations.

Given the diversity of most groups, it is also wise to pitch your course across a range of levels of existing knowledge of the subject. In some cases, it is useful – even important – to find out what knowledge already exists in the group, as well as any questions people have, and build from there. The ethos of U3A is that members share their learning experiences freely, so feel free to incorporate this into your course. Try to make the learning experience pleasant and take the course as you feel best.

Because U3A courses are free and do not lead to qualifications, you may find that the commitment of members to your course varies. Some members attend to seriously learn, while others may come primarily for social reasons. These different expectations may affect the commitment of class members. You may also find that members don't attend regularly for reasons quite unrelated to the quality of your course. So be prepared for this and try not to be too disappointed if it happens. Each

course session needs to allow for the flexibility of members' attendance, as you cannot rely on definite numbers each session.

## Planning Courses and Classes

In planning for your course, it is useful to address the following four areas.

1. **Get clear about your purpose** -- what learning outcomes for participants do you want to achieve?
2. **Decide the method and approach:** For example:
  - Lectures or presentations with member participation.
  - Presentation followed or broken by a break, then a time for questions and involvement of course members sharing their experiences.
  - Shared presentations or stories, which are dependent on the commitment of the members.
  - Discussions, which are dependent on facilitation.
  - Skills teaching, which depends on demonstration.
  - Fieldwork, excursions, trips, walks, which depend on guides, and any combination of these.
3. **Suitability of courses:** If you believe your course is likely to be controversial, you should discuss the matter with the Course Coordinator, bearing in mind the statement found in Attachment 6.

### 4. Decide Practicalities

#### 4.1 Time

Length of session, time of day and frequency of sessions.

#### 4.2 Venue Requirements

Depending on the venue, SH U3A has access to various items of equipment to assist in running a course, including Windows laptop computers, data projectors, wifi (in some venues only), whiteboards and sound systems. In large venues, use of a microphone is recommended as many members experience hearing difficulties. In consultation with you, your course will be allocated to a suitable venue based on your equipment needs and group size. As a general rule, you will need to tailor your presentation to the facilities available in the venue assigned.

#### 4.3 Size of Group

The manageable size of the group will be dependent on subject, treatment and venue capacity. You will be asked to specify a minimum number which makes it worth your while in preparing for and presenting the course and a maximum number that your course and the venue can cater for.

#### 4.4 Wait List

If a member withdraws from the course, a system generated email will be sent to you. If your course has a wait list, the U3A Enrolments Coordinator will enrol a replacement from the wait list in order of preferences and another email will be generated and sent to you.

#### 4.5 Costs of Materials

These include photocopying, text book or equipment necessary. These are to be discussed with the Course Coordinators upfront. At all times, we aim to keep these costs to a minimum.

#### 4.6 Waiver for courses with physical activity

Members of courses involving physical activity will be asked to sign a waiver. See the waiver form (Attachment 5). The following statement must be added to the course description. "For your own safety and the safety of others, you MUST be physically able and fit to participate. You will be asked to sign a waiver form prior to commencing the course. If you have any doubts, please discuss with the Course Leader before choosing to enrol."

#### 4.7 Accident/Incident Form

Course leaders are required to take an Incident/Accident form (Attachment 4) to all courses. All incidents and accidents, no matter how seemingly inconsequential, should be recorded and the completed form sent to the Secretary.

## Course Administration Process Steps

At least 3 months before a term starts	Discuss your course ideas and submit necessary information about your course to Course Coordinator(s) (see Course Proposal Form, Attachment 1) for loading into our database (2 – 3 months prior to the start of a term). <i>It is important to write a brief statement of your course objective/s.</i>
1-2 months before course starts	Once your course is loaded, you will be given access to information in our UMAS membership system. See Attachment 2 for guidance. About 4-6 weeks before Enrolments open, you will be sent an email asking you to check your course entry for accuracy prior to publication and printing.
At the end of the Enrolment Requests Period	At the end of the enrolment requests period (but not during it), you can use UMAS to check enrolments in your course. Again, see Attachment 2. Before enrolments are finalised, if numbers are under the minimum or over the maximum set, you will be contacted by the Course Coordinator/s to decide the best course of action.
In the weeks leading up to your course	<ol style="list-style-type: none"> <li>1. You will be contacted by the Equipment Officer to confirm equipment requirements, technical assistance needed, venue access, etc. If your presentation uses a dataprojector and/or other AV equipment, you will be assisted to do a trial run in the venue for your course.</li> <li>2. If your group needs help, you will be contacted by Course Support advising of members volunteering to assist you. This will include members for Room Setup and Course Assistant (see Attachment 3). <b><i>Most groups organise these roles themselves.</i></b></li> </ol>
1-2 weeks before your course begins	It is important to send an email to course members to welcome and to remind them of the event, and to advise of any particular requirements. If a member withdraws from the course, a system generated email will be sent to you. If your course has a wait list, the U3A Enrolments Coordinator will automatically enrol a replacement from the wait list in order of preferences and another email will be generated and sent to you.
On the day before your course begins	Print out the Attendance List from UMAS (see Attachment 2 for guidance) and the Accident/Incident Report form (Attachment 4). Mark any apologies received on the Attendance List.
At the course	Give the Attendance List to the Course Assistant who, for insurance purposes, needs to ensure each attendee signs in at each attendance.
At the course	When opening your course, remember to introduce yourself, acknowledge the contributions of the other volunteers and welcome any new members. After these housekeeping arrangements, introduce and explain how you propose to run your course. For example, outline: <ol style="list-style-type: none"> <li>(i) the structure of each session and ground rules for the class;</li> <li>(ii) if members may ask questions during the session or at the end;</li> <li>(iii) any references that might be used in the course;</li> <li>(iv) the preparations that members might undertake for classes.</li> </ol> It is wise to check at the start whether everyone can hear and see clearly before continuing, making adjustments then, rather than later.
On conclusion of the course	Please send the completed Attendance List to the Course Coordinator or scan and email, if you have that facility.

## Copyright guide for course leaders

U3A Network NSW, to which we in U3A Southern Highlands belong, has published a Copyright Guide drafted by its Governance Officer, Carmen Champion. Carmen Champion has 40 years of experience in Intellectual Property Law (including copyright) as a corporate lawyer, solicitor and later as a barrister.

U3A Network’s Copyright Guide is at <https://nsw.u3anet.org.au> under U3A GOVERNANCE>COPYRIGHT FOR U3A GROUPS. The U3A Network has negotiated licences (which apply to U3A Southern Highlands Inc and to which we contribute payment) with the three main copyright collecting agencies: Copyright Agency, APRA AMCOS [the trading name of Australasian Performing Right Association Limited (APRA) and Australasian Mechanical Copyright Owners Society (AMCOS)], and the AudioVisual Copyright Agency Ltd (Screenrights) as well as the OneMusic joint licencing initiative.

**What do the current licences cover?**

**Copyright Agency: 2010 Licence No. 5633** <https://www.copyright.com.au/about-us/>

The Education Copyright Licence allows all tutors to copy and communicate certain copyright works (text and images) **for educational purposes**, from any source, including the internet, from anywhere in the world, without having to seek permission prior to use.

Uses allowed by the statutory licence include:

- **hardcopy content: photocopying, scanning**
- **digital content: saving to disk, printing, making available online, emailing.**

**Educational Purpose**

The statutory licensing scheme allows educational institutions to **copy and share text, images and print music** without a copyright clearance **but only if:**

- the educational institution is covered by an agreement to pay fair compensation (U3A Network NSW Inc has entered into a number of blanket agreements); and
- **the use is for educational purposes** (e.g., in connection with a course of instruction).

**Note:** the use of the copyright material must be part of the educational instruction provided by a tutor to a group of people there for that purpose (in the case of U3A, they must be members of U3A).

**What can be copied is set out below.**

	<b>Copy entire work</b>	<b>Copy a “reasonable portion only. Deemed “reasonable portion”</b>
<b>Hardcopy</b>	If: <ul style="list-style-type: none"> <li>• unpublished</li> <li>• published, but not separately; not available (in any form) within a reasonable time at an ordinary commercial price</li> <li>• an article in a periodical (e.g., journal, newspaper or magazine) – more than one if on the same subject</li> <li>• a text work of no more than 15 pages published in an anthology</li> <li>• an image that accompanies (and explains or illustrates) text that can be copied under the Part VB educational statutory licence.</li> </ul> <b>OTHERWISE, A ‘REASONABLE PORTION’.</b>	If work published as edition of 10 or more pages: <ul style="list-style-type: none"> <li>• 10% of the number of pages, or</li> <li>• a chapter (if more than 10% of the pages)</li> </ul>
<b>Digital</b>	If: <ul style="list-style-type: none"> <li>• one of hardcopy criteria applies</li> <li>• work available for purchase, but only in hardcopy</li> <li>• work is an image (even if it is available for purchase in digital form)</li> </ul> <b>OTHERWISE, A ‘REASONABLE PORTION’.</b>	If work published: <ul style="list-style-type: none"> <li>• 10% of the words</li> <li>• a chapter (if more than 10% of the words)</li> <li>• 10% of a musical work</li> </ul>

**Note:** you may make as many copies as you need for the educational purposes of your association. However, no student may acquire more than 10% of a work in any one course. A tutor may not copy 10% of a work one year and another 10% another year for the same class.

**Screenrights (Audio-Visual Copyright Agency Ltd):** 2010 Licence dated 15 June 2010.

<https://www.screenrights.org>

Screenrights licences educational institutions in Australia and New Zealand, enabling them to copy broadcast material (TV and radio) and put these copies on internal networks or email them to staff and students.

Under this statutory licence regime, educational institutions can both copy and communicate online the following:

- (a) Any material broadcast on Australian TV;
- (b) Any material broadcast on Australian radio; and
- (c) Broadcast content made available online by the broadcaster (such as a podcast of a documentary screened on the ABC).

**Note:** The statutory licence does not cover material from online streaming platforms (e.g., Netflix) unless the online streaming platform is that of a broadcaster (e.g., ABC iview).

Activities covered by this licence would include the copying and making available of a television show on an institution's intranet system so that students can access it for research, and the recording into an MP3 file of some music broadcast on a radio show for study in a music class.

**So what can NSW U3As copy? The Screenrights licence allows for the following copying:**

- (a) Any program – including movies, current affairs, documentaries, news.
- (b) Any amount – copy five minutes or an entire drama; make one copy or 20, it's up to you.
- (c) Anywhere – make copies at home or in your local library.
- (d) From any channel – copy from free to air TV, pay TV or radio.
- (e) From free to air broadcasters' websites or the broadcasters' official YouTube channels – copy broadcast material made available online by the broadcaster including podcasts and vodcasts or catchup TV.
- (f) From online simulcasts of broadcasts – including online radio.
- (g) In any format – copy or download and store digital copies on a hard drive or other devices.
- (h) From old copies – update your DVD (or VHS) copies by putting them in digital format.

**U3As may make the following uses of their copies:**

- (a) Show them in a U3A class.
- (b) Keep them in the U3A library as an ongoing resource.
- (c) Store them on a network for U3A tutors and U3A members.
- (d) Email them to U3A tutors and U3A members.
- (e) Show them on an electronic whiteboard.

**Remember** that these rights must only be exercised **for educational purposes**.

Screenrights licenses third parties to make the copies for you, and to stream them to you. Services are available from Clickview, TV4Education, InfoRMIT and Screenrights' own service, EnhanceTV.

Screenrights also provides a website that includes free educational resources for audiovisual material at [www.enhancetv.com.au](http://www.enhancetv.com.au). The main features of the site include free downloadable teachers'/tutors' notes for documentaries and feature films, and an educational IV email guide to which teachers/tutors can subscribe (free of cost).

**OneMusic Licence for Community Groups**

<https://onemusic.com.au/licences/community-music-groups/>

This licence relates to the playing of recorded music at U3A courses and community events and the use of print sheet music.

In particular, it enables:

- Unrestricted playing of PPCA Sound Recordings by our U3A.
- Unrestricted number of live music performances by the Community Music Group at Community Events.
- Reproduction of AMCOS Works in any audio-only format (including in digital form) for the purposes of practice and rehearsals of performances by the Community Music Group at Community Events.
- Reproduction of AMCOS Works for the purposes of making audio sound recordings of performances by the Community Music Group at Community Music Events for provision to the public of those recordings, provided they are offered only:
  - a. free-of-charge; *or*
  - b. if for a fee, either:
    - i. for the purpose only of recovering the Community Music Group's costs;
    - ii. for fund raising directly for the Community Music Group.
- Copying by U3As of print sheet music where the music is still in copyright. An essential requirement of that licence is that the U3A must own the original print sheet music.
- The Reproduction of AMCOS Works of Original Print Music excludes the right to make Arrangements.
- Under this licence, course leaders may play recorded music, e.g., CDs as part of their course.

***Acknowledgement policy:*** all material used, copied or downloaded from any source for any U3A course should acknowledge the author of that material, in the course materials, including the date upon which it has been copied.

## In conclusion

It's helpful to remember that members look forward to learning and sharing each time the group meets.

When seeking to involve members actively, keep before you the ideal of providing a learning situation where each individual is encouraged to contribute as much or as little as they are able to. If everyone feels comfortable enough to contribute, or indeed not to contribute, then it is a healthy learning environment. "They also learn who listen quietly."

If you do have a problem with your group or with your presentation, do not despair; remember that you are not alone. There is, unfortunately, no one solution that fits all, and in most cases it is a matter of trying different things until one succeeds. Always feel free to talk to the Course Coordinators if you have any difficulties or questions about running your course.

If you decide to give a U3A course after reading all this, then you are brave, greatly valued and we welcome your decision!



## Attachment 1: U3A Course Proposal Form

Year 20 Term

<b>COURSE LEADER</b> <b>COURSE CO-LEADER</b> (if applicable)	
<b>U3A Member?</b>	
<b>CONTACT DETAILS</b>	Ph: (M) (H) Email: In the course listing, may we publish this address Y / N ?
<b>COURSE TITLE</b> max 40 characters (explanatory, yet catchy and short)	
<b>COURSE DESCRIPTION</b>  <i>50-100 words</i>  (to be published in the Courses Booklet and in UMAS to attract prospective course members and to include any extra information, e.g., purchase of a text book, photocopying costs)	
<b>COURSE OBJECTIVE/S</b> What do you intend the course to do for participants? (one or perhaps two points will suffice)	
<b>ANY PROPOSED COURSE PRESENTATION COSTS</b> (to be agreed with Course Co-ordinators)	
<b>VENUE REQUIREMENTS</b> e.g., whiteboard, dataprojector, DVD player, microphone. <i>NB:</i> U3A laptops have <i>Windows 10</i> and <i>Office 365</i> loaded.	
<b>WILLING TO RUN BY ZOOM?</b>	
<b>NUMBER OF SESSIONS</b>	
<b>PREFERRED START DATE</b>	
<b>PREFERRED FREQUENCY:</b> Weekly, Fortnightly, Other	
<b>PREFERRED DAY(S) OF THE WEEK</b>	
<b>PREFERRED START &amp; FINISH TIMES</b>	
<b>COURSE NUMBERS: Min, Max</b>	
<b>For Office Use Only</b>	

Please return completed form for discussion and sign-off to Course Coordinator ([courses@sohiu3a.org.au](mailto:courses@sohiu3a.org.au)).

## Attachment 2: Guide to UMAS for course leaders

If you are used to the previous online system, this guide is provided because the appearance and some functions of UMAS are different. (Note: MAS = Membership Administration System.)

If you did not use the previous online system, this guide will support your use of UMAS.

Along with the Management Committee, as a course leader you have administrative access to UMAS beyond normal member access. This helps you perform key administrative actions to successfully lead a course.

**Any queries?** You can email the Course Coordinator at [courses@sohiu3a.org.au](mailto:courses@sohiu3a.org.au).

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This guide shows you how to:

1. Go to our website (p. 10)
2. Login to UMAS (p. 10)
3. Access the Main Menu (p. 10)
  - A. Checking Details of Courses (p. 11)
  - B. Reports: Class List and Attendance List (pp. 11-13)
  - C. Send Emails (pp. 13-15)

Any queries?

You can email the Course Coordinator at [courses@sohiu3a.org.au](mailto:courses@sohiu3a.org.au).

### Notes:

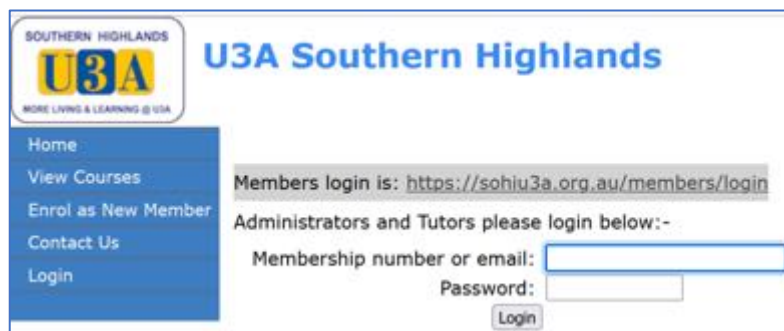
- Throughout this document, the example screens are from the test version of UMAS that contains simulated data. The title 'TEST U3A Southern Highlands' and the menu items to the left of a screen appear in red.
- By contrast with the Test version of UMAS used in early 2022 training, in the live version of UMAS, the word 'TEST' does not appear and the colours are blue (or white on a blue background).
- In the following examples you are fictitious Course Leader Rick Eng and you are leading two simulated courses: News in Review and Cinema on Monday.
- Some screen shots were taken from 2021 term 4 and some from 2022 term 1.
- UMAS sometimes refers to course leaders as *tutors*.

1. GO TO OUR WEBSITE at <https://sohiu3a.org.au/>



Pass the cursor over LOGIN at the top right of the screen, then click Course Leader Login.

2. LOGIN TO UMAS (Membership Administration System)



Enter your member number (or email) and password and click Login.

3. ACCESS THE MAIN MENU

The main menu page will appear, including a welcome message. In the current version of UMAS, the main colour on the left is blue.



**Key menu items** for course leaders are (A) Checking Details of Courses, (B) Reports, and (C) Send Emails.

Clicking on a menu item provides access to a set of functions you can perform in U-MAS. As a course leader, you have access to only those functions needed for your role. For example, you can only view the details of your course; you can email only your participants.

A. CHECKING DETAILS OF COURSES PRIOR TO A NEW TERM

Before the start of a term, the Course Coordinators ask you to check the course details they have entered into UMAS. Please advise them ASAP of any serious errors. They know you will understand that changes in details of venues, dates and times are not easily made at this stage, as they have a cascading domino effect.

Via the SH U3A website <https://sohiu3a.org.au/>, login to UMAS as a Course Leader. On the blue left sidebar, click on *Reports*, then the yellow *Courses* tab.

### Setting the Dates

In the second option which begins “List all courses that commence ...”:

- \* For the first two white Date boxes, use the dropdown calendar to enter the term start and end dates, respectively, ignoring the last *Day* box.
- \* Ignore the next two lines and their boxes.
- \* Click on the green *Courses Occurrence*. This gives courses in order of starting date.
- \* Locate your course/s and click on the hyperlinked *Code* (column 3) to reveal your (non-editable) course details – discuss changes with the Course Coordinator.

Example: The following details will appear for the course you selected (Cinema on Monday):

The screenshot shows the UMAS interface for 'TEST U3A Southern Highlands'. On the left is a sidebar with navigation links: Home, View Member Details, Edit Member Details, Pay Membership, View Courses, Reports, Send Emails, Extensions, Contact Us, Return to Website, and Logout. The main content area is titled 'Course Details' and includes a 'Print' button. The course information is as follows:

- Course Code: 221MED02
- Description: Cinema on Monday
- Frequency: Monthly
- Course Leader: Rick Eng
- Course Leader 2: None
- Type: Specified
- Venue: EMPIRE
- Start Date: 31/01/2022 Mon
- Finish Date: 28/02/2022
- Start Time: 12:00
- Finish Time: 14:30
- Number of weeks: 2
- Amount: \$28.00
- Maximum enrolments: 30
- Number Enrolled: 0

Comments: Experience an enjoyable afternoon at Empire Cinema: movie then coffee/tea at Coffee Culture. Gerard helps us choose an interesting and varied selection. Term Cost is \$28 (Combined Cinema and Coffee). MONEY MUST BE PAID AT TIME OF APPLICATION for enrolment. Members who apply but neglect to pay prior to close of enrolment will not be accepted. If you cannot attend a session, you may deputise another U3A member to attend, but money cannot be refunded.

Additional Comments and Prerequisite: (Empty text area)

A 'Close' button is highlighted with a red box at the bottom left of the course details window.

Click on ‘Close’ to return to the course list.

### B. REPORTS (Enrolment List, Attendance List): Available after initial enrolment period

#### Enrolments List (Class List)

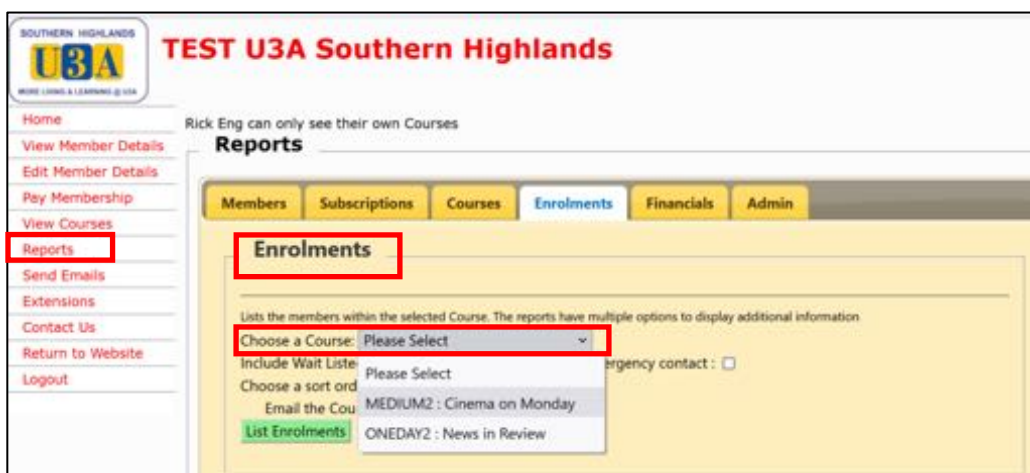
#### What CLs do NOT do with these lists

Please note UMAS does not allow CLs to add members to a course.

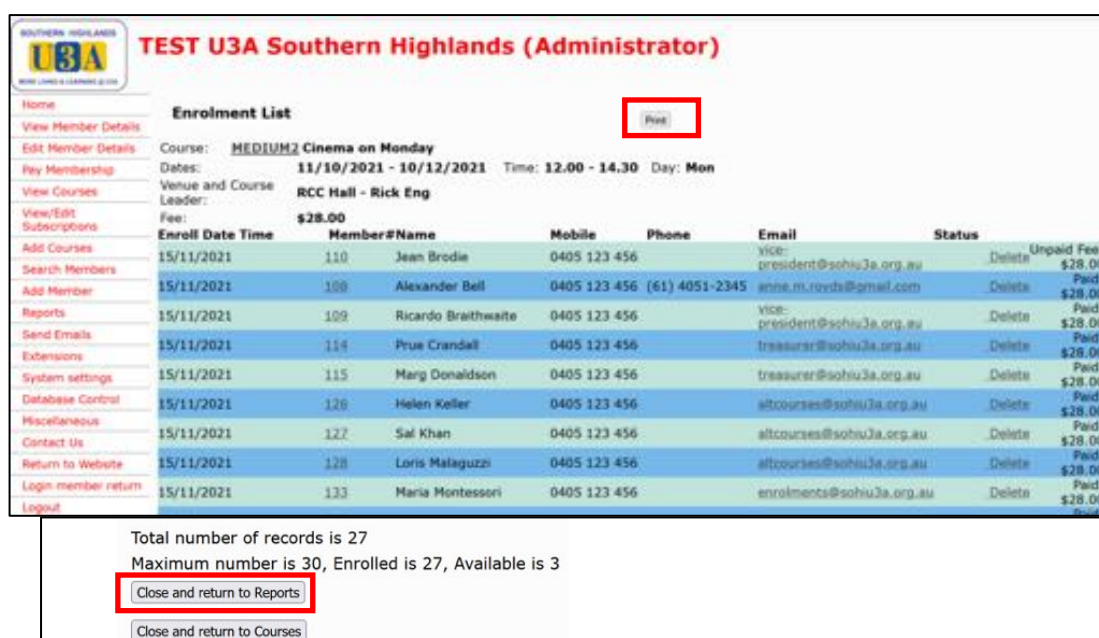
The Enrolments Coordinator does this work, as well as adding members who have been waitlisted.

**Quick Method:** In View Courses, choose your course and click on Rep on the extreme right.

**Longer Method:** Click on Reports and then click the yellow tab labelled Enrolments. Choose the required course by clicking on the box labelled ‘Choose a Course’.



Click the green List Enrolments. The following screen appears for the example of Rick Eng:



To obtain a copy of this list, you can:

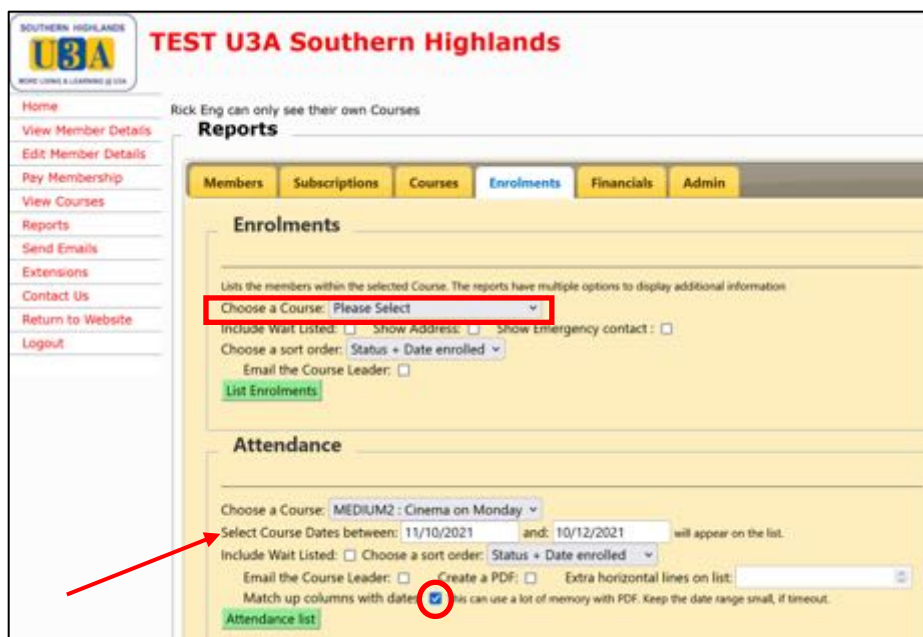
- click Print (near the top) to print the list. When finished, click Close and return to Reports
- copy the list and paste it into a new Word file, perhaps deleting unwanted columns (those on the right of Email) and removing the colour.

### Attendance List

For your Attendance List, go back to the Enrolments tab (in Reports) and the Attendance section near the bottom of the page:

- Choose the required course by clicking on the box labelled Choose a Course.
- Select the start and end dates of the course by clicking in each date box and selecting from the pop-up calendar.

- Tick Match up columns with dates so the list will include a column for each class session and can be used as a sign-in attendance sheet. (The box is usually already ticked.)
- Click the green Attendance List.
- Click the print button to print the list. Alternatively, you can copy the details and paste them into an Excel spreadsheet or Word file if you wish to save the list and/or reformat it.



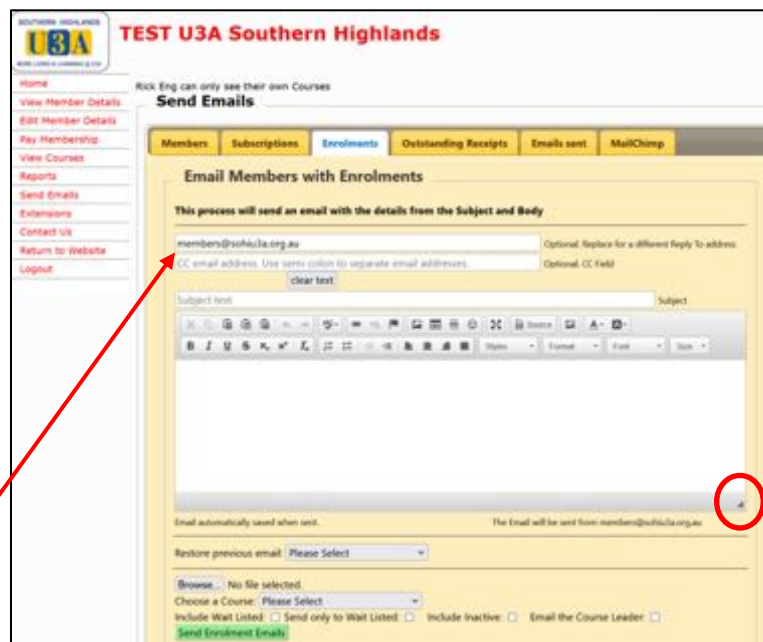
Below is the pop-up window, showing the two sessions for the course:

Attendance List		
Course:	MEDIUM2 Cinema on Monday	Print
Date:	11/10/2021 - 10/12/2021	Time: 12:00 - 14:30 Day: Mon
Venue and Course Leader:	RCC Hall - Rick Eng	
Fee:	\$28.00	
Name	11/10	09/11
Jean Brodie (110)		
Alexander Bell (108)		
Ricardo Beatrizwaite (109)		
Prer Crandall (114)		
Marg Donaldson (115)		
Helmi Kefler (126)		
Sai Khan (127)		
Loris Malaguzzi (128)		
Maria Montessori (131)		

### C. Send Emails

It is very important to email class members 10 or more days before the course begins. Welcome them to the course and provide any further necessary details, **including the course dates**. If in doubt, you can find these dates from the Attendance List.

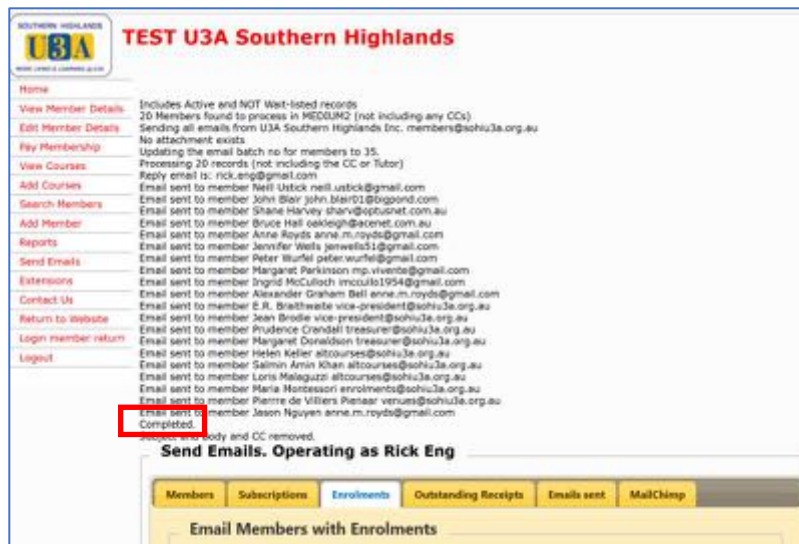
The facility described below will automatically send an email to your course participants. Click on Send Emails and then on the top Enrolments tab. The following screen appears:



- **Important:** Type *your own email address* in the Sender field (replacing [members@sohiu3a.org.au](mailto:members@sohiu3a.org.au)) so that replies come back to you. It also provides participants with your email address if they wish to make contact, e.g., notify you of an absence.
- Type the subject of your email in the ‘Subject text’ box.
- Choose the required course by clicking in the box ‘Choose a Course’.
- If you have more than one course in the term, send emails to one course at a time.
- You can personalise the message to show each person’s first name by inserting as the first line of the text a greeting (e.g., Dear or Hi) followed by a space and [firstname] or [preferredname]. *You need to be exact:* Dear [firstname]. See the example email that follows. (The system automatically uses the enrolment list to fill in each person’s name.)
- Type your message in the white box, re-sizing it if you wish by dragging down the bottom right corner where you see a small black triangle.
- In your message, tell the participants they can reply to the email.
- A hyperlink to a web site may be added in the body of the text.
- Using ‘Restore previous email’ enables the retrieval of previous emails you have sent as templates for new messages to be sent. Just click on the one you wish to use.
- *One* attachment to your email is allowed in this email system. Click on Browse, then on your computer locate and choose the file required.
- At the end of your message, remember to sign with something like ‘Regards, Rick’.
- Finally, click on the green Send Enrolment Emails.
- When you see the following message and you are ready, click Yes.

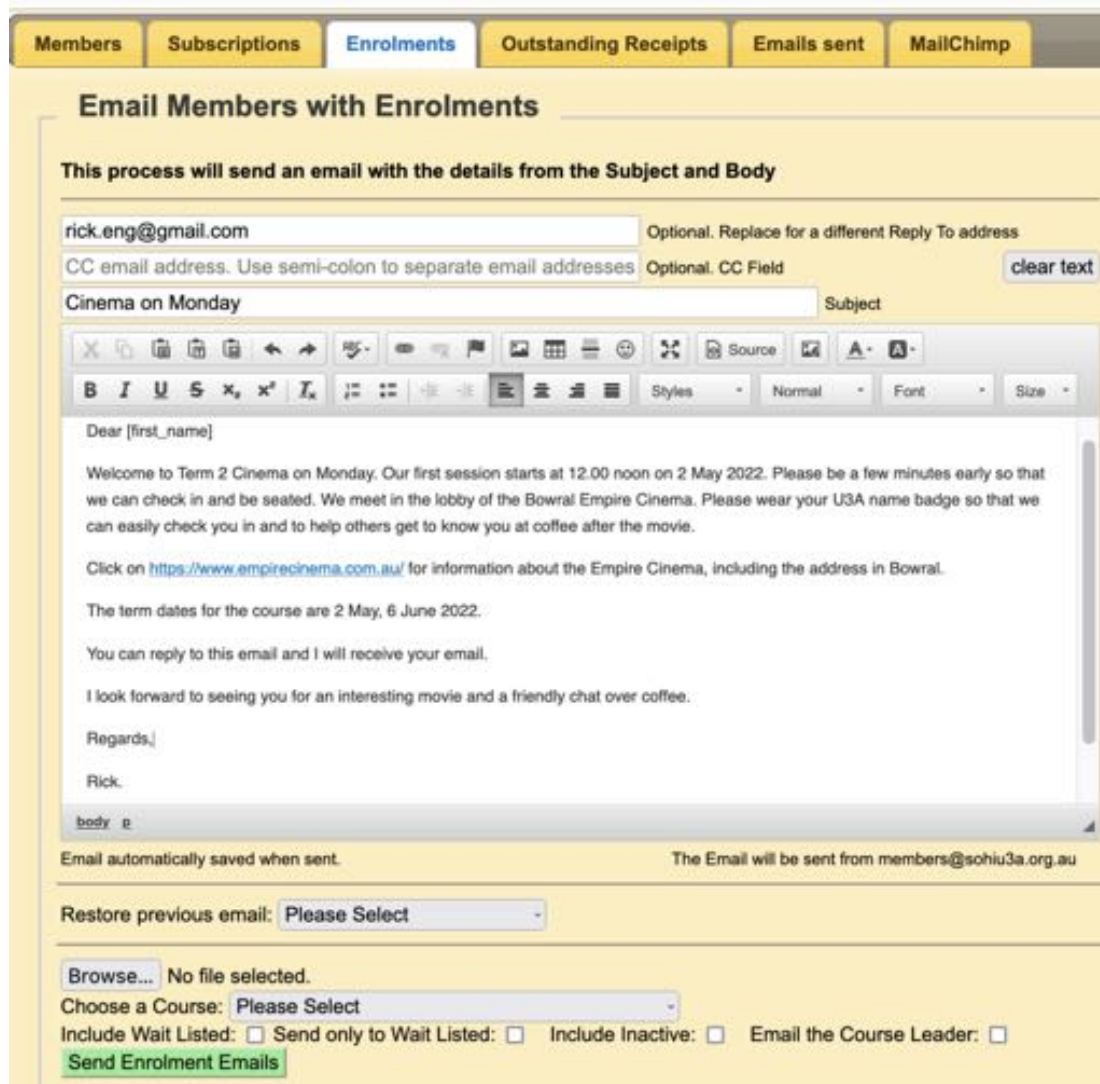


- As shown below, the screen will be updated with additional message lines as the emails are sent. *You may need to wait to be sure the emails have gone.* The word ‘Completed’ appears near the end of the message lines when all emails have been sent.



**Example email:** Below is a typical filled-in example from Rick Eng (with term 2, 2022 dates). You will notice that

- the course leader’s own address appears in the first field (sender’s email address)
- the course leader has typed in a subject
- he has used a personalised greeting, taking care to get it exactly right!





## Attachment 3: Guidelines for course support roles (updated March 2022)

**Note:** During any Covid restrictions, there are significant variations on these guidelines. Refer to the website under About Us>Policies & Procedures>Covid Safety Policy.

### Course Assistant

The Course Assistant is the course leader's 'right hand'. While the course leader is responsible for what happens during a U3A Course, the Course Assistant assists with the setting up before class and ensures that everything is put away afterwards. A setup team is sometimes allocated to help; often, course members volunteer on the day to do it -- if necessary, ask other members to help.

#### **Duties:**

1. Arrive 30 minutes before starting time of the course.
2. Obtain the Attendance List from the course leader and ensure that all members of the course initial or sign next to their names when they arrive. Ticks are not acceptable for insurance purposes.
3. At the first session, collect any money for printing etc as described by the course leader which is specified in the course booklet.
4. Make sure that the setup team have all the chairs out and that everything is done for the reasonable comfort of the members and the course leader.
5. Provide a glass of water for the course leader.
6. After class, make sure that lights, fans, air-conditioners, hot water heater etc are OFF and that the venue is left as it was before the course commenced.
7. At the end of the course, propose a Vote of Thanks to the course leader.

### Setup Team

1. Arrive 30 mins prior to the course starting time.
2. Liaise with course leader re room setup.  
Note: Not every course leader wants chairs in rows.
3. Under Covid conditions, chairs are wiped clean before and after use.
4. At the end of the session, ensure that the chairs are neatly stacked in the designated place. (For example, at East Bowral signs indicate that chairs are to be stacked no more than three chairs high and there are certain areas where chairs are not permitted to be stacked.)
5. Vacuum if necessary and ensure everything is left clean and tidy.

## Attachment 4: Accident/Incident Form

### U3a Southern Highlands Inc Incident/Accident Report

Completed Incident/Accident Forms are to be sent to the Secretary (address below).

Course:

Member's Name:

Course Leader:

Date of Incident/Accident/Injury:

Time:

What Happened:

Nature of Injury

Bodily Location of Injury

Action Taken:

Witness Name (1):

Witness Name (2):

SIGNATURES:

Member

Course Leader

Witness (1)

Witness (2)

Please return as soon as possible to

Secretary, U3A Southern Highlands, P.O. Box 421, BOWRAL NSW 2576

# Attachment 5: Release of liability waiver form

## U3A Southern Highlands Inc Release of liability waiver

Course Name : .....  
Venue: .....  
Term, date/s and time: .....

Your signature below demonstrates your acknowledgement and agreement to the following waiver.

- I attest that I have read and understand the description of this U3A activity and that I am physically able and fit enough to fully participate.
- I agree to participate in the activity listed above with due care for myself and consideration of others.
- I hereby release U3A Southern Highlands, its officers and members, and will not hold them liable for any injury incurred during, or as a result of, my participation in this activity.

Print name: ..... Signature: .....

## Attachment 6: Suitability of Courses

### PURPOSE

To provide a framework to facilitate assessment of the suitability of courses.

### CONTEXT

#### Constitution

*“A. Objects:*

- 2.The curriculum of a U3A shall be determined by the needs/preferences of members and according to the resources available to it.
- 3.To be at all times non-political and non-sectarian in its provision of learning opportunities.”

#### General Disclaimer (published in Course Booklet every term)

U3A Southern Highlands Inc. (U3A SH) offers courses to members presented by members for mutual education and learning. Members enrolling in courses should carefully read the Course Outline to ensure the Course is suitable and appropriate to their own circumstances. The offering of any Course does not imply the Course is necessarily endorsed or recommended by U3A Southern Highlands Inc. No financial, legal or health decision should be made solely on the basis of Course material. Members who find Course material confronting in any way are free to leave any class at any time.

#### U3A SH Operational Guidelines

The principal purpose of (U3A SH) is to enable a learning community by making available scheduled activities with a learning outcome (courses) for lifelong learning and social interaction for its members.

The requirement in the Constitution for U3A SH to be at all times **non-political and non-sectarian** in its provision of learning opportunities means that there is an expectation on Course Leaders in developing and delivering courses to ensure that U3A SH:

- is not affiliated with a specific political party or political point of view, and
- is not affiliated with a specific religious denomination or doctrine.

It is expected that operation of the association will be governed by generally accepted principles associated with freedom of opinion and freedom of expression. Freedom of expression at U3A SH carries with it a responsibility to not only comply with the law, but also the U3A SH Code of Conduct (viz., avoiding discriminatory behaviours with respect to ethnicity, culture, gender, sexuality, religion, age or disability), to respect the rights or reputations of others, to ensure no harm and to protect public health and order.

For courses on topics which may be assessed as controversial:

- Where it can be expected that members attending courses may have differing opinions, it is expected that the Course Leader will make clear the position s/he will take via the course description (and course objective if there is one) so that members know what to expect if they attend
- Otherwise, the Course Leader is expected to facilitate discussion across the range of perspectives of members attending.

#### Acceptance of Courses

The responsibility for determining suitability of courses is as follows:

Course Leader – prepares a proposal in accordance with these requirements

Course Coordinator – assesses proposals, provides advice, and wherever possible accepts new course proposals

President – consulted by Course Coordinator, as required

Management Committee – makes final decision with respect to all courses.

#### Complaints Handling

Under the U3A SH Complaint Handling Policy

- any feedback about specific courses is to be directed to the Course Co-ordinator
- if the matter is further escalated, a written complaint should be forwarded to a member of the Management Committee (in this case most likely the Course Co-ordinator) by email or to the U3A SH post office box
- if the individual Committee member is unable to resolve a matter referred to them, it will be recorded and submitted to the Management Committee via the President for resolution.

*Approved by U3A SH Management Committee on 16 August 2022.*