



GUIDELINES FOR ORGANISING STUDY DAYS & WORKSHOPS

February 2016

These guidelines are intended to give a broad outline of the general requirements for organising a Study Day. They are not intended to be a mandatory set of rules but rather a checklist for running a successful event.

It is worth noting “The Objects of U3A Thames Valley Network are to advance the education of members of U3As in the network. Also to encourage the provision of leisure activities for their social welfare by facilitating cooperation between U3As in the Network.” In particular, U3A TVN exists *inter alia* to organise a programme of events, including Study Days and Workshops, not within the scope of an individual U3A. To facilitate this an Events Team exists, under a permanent Co-ordinator elected by TVN, to assist and advise potential organisers. All current organisers are co-opted to this team

Advise: All members of the Events Team are happy to help but if you would like a designated contact person for your event, just ask. For first time organisers, the Events Co-ordinator will often appoint someone as liaison. . (see page 8)

GETTING STARTED

You will need:

- To identify a subject for a Study Day
- To agree a date with the Events Co-ordinator
- To find a suitable venue
- Draft a Programme
- Find speakers
- Organise catering
- Find helpers
- Make a budget
- Publicise the event

Subject:

The event should be badged as a U3A Thames Valley Network Event, forming part of a coordinated TVN Calendar. The subject should be something that will have general appeal although this might be a minority interest.

Establishing the format and programme for the event can be the most difficult part of organising a Study Day. Consider the type of day you wish to organise and the subject to be covered:

- Decide what it is you want in the programme.
- What are you trying to achieve?
- What message do you want to convey?
- Is it purely presentations, or a mixture of presentations and workshops, or even displays and hands on as well?
- Do you expect many people to be interested, or is it a minority group?

Date:

The date for the event must be agreed with the speakers and the availability of the venue ascertained. Check the proposed date with the TVN Events co-ordinator and consider any other national U3A events and local public events.

Venue:

As far as possible the event should be accessible to all U3A members of TVN affiliated U3As. The venue should be chosen with travelling in mind, (public transport and / or car parking) as well as suitability to the subject of the event.

The venue for a particular event should be chosen to suit the type of event planned; where it is to be a day of lectures, an equipped Lecture Theatre is suitable, whereas a day of talks and associated workshops may require a school in order to have a large hall plus separate seminar rooms. Other specialist venues may be appropriate for specific study.

Factors to consider are:

- Is main area large enough for the expected numbers? (Maximum insured capacity)
- Are there other rooms available, all with sufficient chairs & tables as required?
- Are the toilets clean and have they or will they supply soap, towels, etc?
- Kitchen: are there sufficient cups, plates, cutlery, glasses etc. to cover requirements
- Where will lunch be served and eaten?
- Are there facilities for washing up?
- Are necessary audio-visual facilities (i.e. projector, sound system, screen, etc.) available?
- Are they insured for public liability? Sometimes you have to cover this cost.

It is a good idea to make sure that they understand what U3A is about as this can sometimes result in reduced fees. In particular schools have an OFSTED obligation for community education and allowing U3A events can be highly beneficial for them.

Programme: - *for sample see Appendix A*

Assuming a full day is planned, a start time of 10:00 am and finish time of 4:00 pm might be appropriate. (Remember in winter many members wish to drive home before dark) The programme for the day will be very dependent on the subject, venue and activities planned. A typical day will start with registration and coffee. It is important to establish a coordinated programme that addresses the subject and develops a theme. It might be a day of lectures or a day of talks and workshops. The choice is yours. Either way it could finish with a Summary and Panel Discussion, questions and answers. A conclusion is always good.

Speakers:

Finding good speakers is essential to the success of the event. Appendix B gives some suggestions for possible sources and contacts.

Points to consider

- What content do you want to have?
- Where do you want the speakers to come from? (e.g. U3A, external, university)
- How do you ensure the speakers are good quality?
- How much will they charge?
- How far away are they? Travel expenses.

When contacting speakers, every effort should be made to give a clear and unambiguous explanation of what is required, again ensuring that they know about U3A.

Catering:

It is usual to provide coffee, tea and biscuits on arrival and facilities for so doing must be checked with the venue. Lunch may be provided by the venue in some cases, or members may be asked to bring their own. Alternatively, caterers may be employed (either U3A, W.I. or commercial) but it is important to check with the venue, as some places will only allow their own staff to be used. At some venues it is practical to use local pubs. If wine or beer is to be served a Drinks Licence will be needed. This can normally be organised by the venue at a small extra charge.

Helpers:

- Chairman - Normally it is necessary to have a Chairman or Leader for the day. He / she will give any notices (health & safety) and introduce speakers.
- Workshop Leaders: If the day is to include workshops and other activities, Workshop Leaders will be required for the various individual topics. Usually but not necessarily these will be U3A Members but they could be chosen from outside the network.
- Directions: If the venue is a large one such as a school, helpers to direct participants on arrival are useful.
- U3A rosettes: These are available to identify 'staff' - ask the Events Co-ordinator to lend them.
- Set-up: Helpers may also be needed to put out tables and chairs unless this is done by the venue (check extra cost?)
- Registration: Someone will have to run the registration desk and the number of helpers needed here depends on the number of attendees. It is worth noting that U3A members always arrive very early. Sticky labels are often issued to help identify participants and different colours may help denote groups, if applicable.
- Refreshments: Unless provided by the venue, helpers will be needed to serve coffee and wash up cups.

Budget:

A budget for the event must be established and discussed and agreed with the Events Team. Events should be planned to break even financially. However, the Thames Valley Network will underwrite the cost of approved events, in case a loss is sustained at the end of the day. All income must be paid to the Network and any surplus will accrue to the Network.

Appendix C shows a sample Budget Form.

Things to take into account include:

- Speaker fees
- Speaker expenses
- Hire of venue
- Catering, including coffee, tea and biscuits on arrival
- Administration costs
- Contingency.

Study Day and Workshop fees will vary significantly according to the nature of the event but should typically be in the region of £8 to £20 per person (plus the cost of lunch if provided). Past events suggest that U3A members are comfortable with fees of up to £15 / £20 + £5 to £6 for lunch.

In determining the fees, the total cost must be established and divided by the expected number of attendees; for most events, it is the number of attendees that determines the financial outcome. Care must be taken in establishing the minimum and maximum number of attendees that will make the event viable but not over-subscribed.

Members from U3As not affiliated to the TVN may be welcomed if space permits but an additional fee of £2 per person must be charged. Priority should be given to applicants from U3As in the TVN.

Lunch should be budgeted separately and a price per head agreed with the caterers. The cost of coffee etc. should be included in the fee for the day.

Helpers may be given reduced or free entry and / or a free lunch depending on the extent to which their assignment renders full participation in the event impossible. e.g. those doing registration can fully participate but those preparing and washing up lunch cannot. (Try to ensure they are all offered coffee if they cannot fetch their own.)

The TVN Events Co-ordinator must be offered free entry to all events but will pay for any expense incurred e.g. lunch.

The organiser's administration costs may also include travel to attend Events Team meetings as well as reconnaissance trips to the venue.

Publicity

Having established a Study Day, the event must be advertised. A Flyer should be prepared and published, along with a separate Application Form, preferably around six months in advance of the event. You may need to give a closing date in certain circumstances. (e.g. the venue requires 21 days notice of numbers.)

The Flyer must give details of the event as well as being eye-catching and suitable for display on notice boards as well as on line. One side of A4 is ideal. It must carry the U3A TVN logo. *Sample shown in Appendix D*

The Application Form should ideally follow the same graphic style but should contain less 'artwork' to save both space and size of electronic files. It must include the name and date of the event as well as the necessary wording and space for the applicant's details.

The exact wording on the Application Form is important and should follow that given in Appendix E (Certification of U3A membership, cheques payable to: requirement for s.a.e. etc.)

A copy of the Flyer and the Application Form must be sent to the TVN web-master for posting and another copy to TVN Circulation in order for it to be sent out to the TVN contact list. *(Both addresses are listed on page 8)*

ADMINISTRATION OF APPLICATIONS

Someone's name and address will have been printed on the Application Form identifying where bookings must be sent. It is suggested that the following procedures are followed to avoid risk of misunderstanding.

Applications will start to be received within a few days of the Flyer and Application Form being issued and must be registered. Appendix F shows a sample Excel spread sheet for the purpose.

Use one line for each individual, even if you have received a joint application.

All applications should have the date they were received recorded as well as the applicant's name, first name and U3A. It is important to enter these in separate fields so that you can sort alphabetically for registration and reporting purposes. If applications cannot be dealt with immediately (perhaps due to the administrator being on holiday) the order they were received may be established from the postmark or the date on the cheque.

Acknowledge all applications by email, assuming they are correct (and some won't be) stating that (a) a place has been allocated, with or without lunch as applicable b) the cheque may not be banked immediately and (c) a reminder and joining Instructions will be sent out around two weeks before the event. Don't forget to include "U3A" in the subject line – some people won't open anything from an address they don't recognise.

If no email address is provided, create an email and then print it out and send it off in the stamped addressed envelope requested. If neither is provided, an acknowledgement is not required.

Incomplete applications, (most usually failing to give the name of the U3A to which they belong or incorrect cheques), must not be accepted but an email sent to the applicant asking for the missing information.

Applications must not be accepted from non U3A members (except for carers of disabled members who will pay incurred costs only) nor places allocated until a correct application has been submitted, together with a cheque. Places cannot be reserved by phone or email. No cheque equals no place.

A list of network U3As is on the web site at <http://www.u3atvnetwork.org.uk> not all U3As in the area are affiliated. Members of non-affiliated U3As must pay an extra £2.

Where a non TVN application is received it should be acknowledged but places only allocated when the bulk of U3A TVN applicants are considered to have been accommodated.

When the event is fully booked, further applicants should be informed that their names have been put on a waiting list and that their cheques will not be banked unless a place becomes available, at which time they will be notified. If no place becomes available, the cheque should be destroyed and the applicant notified accordingly.

When an event is full, the TVN web-master must be informed so that the Application Form may be removed from the web site.

All cheques received must be sent to the U3A TVN Treasurer. (*address in Appendix G*) These must be listed giving name (preferably alphabetically) and amount with no more than 40 cheques in each batch. To pay speakers and the venue etc. obtain an invoice and send it to the TVN Treasurer for payment or ask for a cheque to be sent to you for payment on the day.

Refunds Policy:

- No refunds will be given when applicants fail to show up on the day, for whatever reason.
- An applicant may pass their place on to another U3A member and arrange the payment between them. The event organiser must be informed of the change.
- An applicant who is unable to attend may be entitled to a refund if they inform the event organiser well in advance of the event, providing their withdrawal does not render the event unviable. (e.g. there is a waiting list) A small administration charge may be made.

JOINING INSTRUCTIONS

Approximately 2 weeks before the event an email should be sent to all applicants reminding them that they have booked. Include the name of the event, the date, time and address of the venue and any necessary joining Instructions or directions. This should be sent preferably as a text email rather than an attachment. Make sure "U3A" is included in the subject line. A printed copy should be posted to those without email.

ON THE DAY OF THE EVENT

If possible, prior to the event it is worthwhile visiting the venue to ensure all necessary arrangements are in place and facilities are working. In particular the audio -visual systems to be used should be checked including compatibility with any personal computer equipment.

- Ensure you have the mobile phone numbers of all your speakers and key helpers.
- Arrive early and check all the facilities before the key holder / caretaker leaves.
- Make sure you know where the light switches are
- How the sound system works
- That the doors are unlocked and provisioned
- Kitchen is clean and ready – how the dishwasher works
- Useful to know whereabouts of local shop in case of emergency

At the end of the day:

- Don't forget to thank everyone, including all your helpers.
- A general request to the audience to help stack chairs etc. will usually result in a speedy clear up.

AFTER THE EVENT

- The final accounts must be sent to the TVN Treasurer (*see below*)
- A short report on the day should be sent to the Events Co-ordinator. This should include the number of attendees from each U3A.

FINALLY - Give yourself a huge pat on the back for a job well done. Most organisers feel a sense of satisfaction and have thoroughly enjoyed the experience, although at times it may have been challenging. You will have met a great many new people and hopefully enjoyed a day on a subject that interested you. THANK YOU.

USEFUL ADDRESSES:

Events Co-ordinator	Patsy Thornton	patsy@thorntac.co.uk
Deputy Co-ordinator	Jane Sellwood	janesellwood09@gmail.com
TVN Web Master	Len Smith	len@smith.net
TVN Circulation	Mike Price	mmpri12@gmail.com
TVN Treasurer	Agnes Budagovska	agnes-bud@supanet.com
TVN Catering *	Susie Berry	susie@susieberry.co.uk

* *This is an unofficial title but Susie is a U3A member who will do catering on an expenses only basis for U3A events. There are many other options.*

APPENDIX A

A provisional programme for the day – to be included in the Flyer if possible – might look something like this:

PROVISIONAL PROGRAMME	
10.00	Arrival, Registration and Coffee
10.30	Welcome / Introduction
10.40	Keynote Talk Title by Prof. A.B. Smith
11.45	Talk no 2 Title by Jane Brown, Nettlebed U3A
12.30	LUNCH
13.30	Talk no 3 or Workshops
	Group 1 - subject
	Group 2 – subject
	Group 3 – subject
15.00	Summary / Panel Discussion / Workshop reports
15.30	Q & As
16.00	Depart

Other “activity days” might require applicants to make a choice of what they wish to attend. In this case a plenary session at the start and another at the end of the day seems to work best.

APPENDIX B : Speakers

- TVN maintains a list of Speakers – ask the Events Co-ordinator
- Most major organisations like The National Trust, the RSPB, the Royal Horticultural Society etc will provide speakers if asked in due time.
- Oxford, Reading and Oxford Brookes Universities are good sources in our area.
- The U3A subject advisors list, published on the web site and in Third Age Matters may help.
- Specific venues may have their own ‘in house’ experts.

APPENDIX C: Budget example – (figures are fictional and the reality will vary considerably)

Thames Valley Network – New Study Day at Venue on day, date, month, year.

ITEM	COST	TOTAL	NOTES
Venue hire	120.00	150.00	Max capacity 150
Kitchen	30.00		
Other venue costs		40.00	
Sound system	20.00		
Drinks licence	20.00		
Speaker fees		130.00	
Prof. X	80.00		
Mr Y	50.00		
Speaker expenses		100.00	Allowance
Prof. X est.	51.20		By car at 40p / mile
Mr Y	30.00		Agreed cost
Mrs Z (U3A) est	12.80		By car at 40p
Catering		28.00	
Coffee etc.	10.00		
Lunch for 3 speakers	18.00		
Administration		52.00	
Printing	12.00		
Travel est.	40.00		
Miscellaneous		6.00	
Flip chart paper	6.00		
Contingency		50.00	
Approx. 10%			
Total of fixed costs		£556.00	

Estimated minimum attendance 60

$556 \div 60 = 9.2$ Therefore charge for the day should be £10 per person plus lunch.