



Approved by Committee 02/04/2026

Role of Interest Group Facilitator

The role of Interest Group Facilitator is a responsible position for Olton and District u3a, and varies depending on the nature of the group to be managed; not all of the functions listed below are relevant to all groups. An Interest Group Facilitator must work with the Group Co-ordinator to ensure that the group is run correctly and that any problems are resolved swiftly. An Interest Group Facilitator should be flexible and be diplomatic and approachable. He or she should be a positive leader, who is able to delegate in a friendly, non-authoritative, manner. Good communication is essential.

The following lists the main functions of a Group Facilitator or their deputy/joint facilitator:

- Record details of group members on the Beacon system
- At each meeting of the group, take a register of all the members attending
- If any attendee is not a u3a member, collect a visitor's fee and record their attendance. Report non-member attendance to the Membership Secretary
- Where necessary, book venue for the group meeting, liaising with the Treasurer to ensure that payments to the venue are made in a timely manner. Invoices should be sent to the Interest Group Facilitator who will approve payment and forward the invoice to the Treasurer
- Organise events/meetings, communicating dates, times and venues with the members of the group, e.g. via Beacon email, the Olton & District u3a website or phone (for members with no email access) or via the monthly newsletter, as appropriate
- Encourage participation from all members of the group. Include all the group members in any discussions and decision making
- At each meeting of the group perform a risk assessment, if appropriate. If any issues are identified, complete a risk assessment form and forward it to the Group Co-ordinator
- Collect fees or payments where appropriate. Record any payments on the attendance register (e.g. for exercise classes). When payments apply to trips and outings, inform the members how to make the payment (cheque or BACS) and what information to supply when making the payment
- Maintain financial records for the group. Enter details of income and expenditure in the Beacon system where appropriate, or else agree a suitable alternative financial record with the Treasurer. Obey all financial rules set out in Financial Guidelines for Group Facilitators
- Deliver all monies collected from the group members to the Treasurer, in a timely manner, or pay the monies into the bank or post office using a bank deposit card supplied by the Treasurer
- Communicate news about the group to the Newsletter Editor, Events Diary Editor and Web Editor to ensure that all u3a members have information about the group
- Ensure that any incidents are properly recorded and reported to the Group Co-ordinator
- Ensure that any welfare or safeguarding matters are noted and reported to the Group Co-ordinator and/or the Welfare Co-ordinator, making sure that the confidentiality of any affected member is preserved