



## U3A CROYDON - POSITION DESCRIPTIONS FOR 2022-2023

These position descriptions are deliberately brief, partly so as not to inhibit a person's natural flair and ability and partly because the committee is a co-operative and should compensate for each other's strengths and weaknesses. The committee has a cumulative responsibility to see that U3A Croydon is well managed.

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### **PRESIDENT**

- Lead and inspire the U3A.
- Manage and co-ordinate the operations of the U3A.
- Represent the U3A at appropriate State and National meetings and liaise with State and local government representatives.
- Review and update the policies of the U3A and recommend changes to rules and other documents to maintain their relevance and compliance.
- Ensure compliance with the Strategic Plan and review and recommend updates as required.
- Chair executive and management committee meetings.
- The President is an ex-officio member of all sub committees.
- Perform additional tasks related to the candidate's interests and experience.

### **VICE – PRESIDENT**

- Understudy the President and deputise when he/she is not present.
- Prepare and implement strategies to increase membership.
- Handle all applications for grants as directed by the management committee.
- Represent the U3A on external committees as determined by the committee.
- Perform additional tasks related to the candidate's interests and experience.

### **SECRETARY**

- Be informed of the legislative requirements of Incorporated Associations.
- Organise the Annual General Meeting, record the minutes and circulate as required.
- Inform all stakeholders of new Committee formed after AGM.
- Complete and submit the annual statements for Consumer Affairs Victoria and the Victorian Charities and Not for Profit Commission.
- Handle incoming and outgoing correspondence, circulating to committee members as appropriate.
- Prepare and circulate the agenda and any other relevant documents prior to committee meetings.
- Record the minutes of all committee meetings and circulate to committee members.
- Create and manage an easily accessible filing system online on SharePoint.
- Implement MS365 and TEAMS for committee to work remotely.
- Attend executive meetings with Council and other stakeholders.
- Ensure position descriptions are maintained and up to date prior to each AGM
- Perform additional tasks related to the candidate's interests and experience.

### **TREASURER**

- Bank all monies received and reconcile merchant card receipts.
- Transfer funds held by PayPal to bank account monthly.
- Manage Term Deposits.
- Apply cash and cheques received at office from members for subscriptions and fees to update each members' status in U-MAS.

- Pay all accounts by the due date provided the account are valid and the goods and service have been supplied. Also pay prepayments when applicable.
- Maintain files for vouchers supporting receipts and payments.
- Ensure adequate insurance covers are in place.
- Circulate Public Liability Insurance Placement certificates to appropriate organisations.
- Reconcile bank statements monthly.
- Prepare monthly financial reports for committee meetings including:
  - Profit and Loss
  - Balance Sheet
  - List of payments for ratification from the previous period between Committee Meetings
- Prepare and lodge the quarterly Business Activity Statement with ATO.
- Prepare annual budget.
- Prepare annual financial reports for the AGM.
- Arrange the auditing of the annual accounts.
- Attend Committee Meetings to advise on financial matters.
- Assist the Secretary with the lodgement of the Financial Report to the ACNC and Corporate Affairs following approval at the AGM.

### **COURSE CO-ORDINATOR**

- Source and interview prospective tutors, prepare proposals for inclusion in the course list including suitable venue, time and day.
- Advertise new courses in the Newsletter and monitor progress.
- Regularly review course lists and status – advertise and promote courses with vacancies.
- Liaise with tutors on issues that arise relating to courses, descriptions, times, venues and equipment. Provide additional support if required.
- Liaise with Venues Coordinator for suitable venues.
- Occasionally visit leaders at their venue.
- Periodically review and update the contents of the tutors' handbook.
- Consult with Course Administrator on issues relating to new or cancelled courses, attendance and enrolment lists.
- Arrange quarterly tutor's meetings and provide a follow up bulletin covering the issues discussed.
- Prepare and submit any information relevant to courses and tutors to the Newsletter Editor to keep members aware of opportunities to increase their participation.
- Promote collaboration with local council, other U3As and organisations that would advance the learning and social opportunities for seniors in our area.

### **COURSE ADMINISTRATOR**

- Liaise with and support the Course Co-ordinator.
- Maintain the U-MAS database adding deleting and correcting courses when advised by the Course Co-ordinator or members.
- Liaise and support the Systems Administrator advising of any anomalies found within the U-MAS system.
- Maintain and update the U-MAS system on a daily and yearly basis to ensure the data base is current at all times.
- Update the Timeline document (the detailed instructions for the Course Administrator) to reflect changes to the system as they are made.
- Keep informed of U-MAS updates and attend U-MAS update meetings as required.
- Prepare and print enrolment and attendance lists at the beginning of each term.
- Prepare labels for Newsletters as per scheduled dates.

### **SYSTEM ADMINISTRATOR**

- Lead the U-MAS enrolment system team.
- Implement U-MAS system.
- Maintain all office & Computer Room equipment incl: monitors, desktop computers, laptops, printers, iPad, modem, internet & TV in Computer Room. Also maintain record of all Computer passwords.
- Arrange for the repair of, or purchase to replace if necessary, any of the Office & Computer Room computer equipment by outside Computer Technician.
- Attend to & correct any system errors and/or system failings & convey information to U-MAS Team members & appropriate Office staff.
- Periodically update the Course List using the DocOMatic computer program & upload to website.
- Undertake Training sessions for Computer Operators involved in Member Assisted Enrolments during enrolment days.
- Attend to & complete procedure & final rollover of members prior to following the year's course enrolments & subscription renewals.
- Liaise with U-MAS User Group, attend & participate in User Group meetings, put forward any suggestions for system improvements to User Group Team members & appropriate Office staff of any results and System updates.
- Maintain Time-Line of the daily, weekly and monthly tasks associated with U-MAS System.
- Maintain control & networking of Photocopier incl. member passwords.

### **EVENTS CO-ORDINATOR**

- Organise, manage and publicise events for the U3A including, but not exclusively, the tutors lunch (Dec), volunteers' lunch (Sept) and annual general meetings.
- Liaise with the member in charge of the Annual Concert.
- Assist Secretary to organise, manage and publicise the AGM.
- Keeping records up to date with the relevant information relating to membership awards.
- Liaise with Volunteer Co-ordinator re data on Continually 'Active' Volunteers for 10yr/15yr badges etc. presented at AGMs.
- Obtain/keep print out of all Volunteer listings from U-MAS for each year as confirmation of Continuously Active Volunteering for future reference if a dispute occurs.
- Arranging for the purchase of these membership awards and update Honour Board annually.
- Manage the participation of U3A in events which publicise the range of activities provided by the U3A such as the Maroondah Festival, Shopping Centre Displays and Seniors Week etc.
- Work in conjunction with the Volunteer Co-ordinator and Publicity Officer to ensure all events are well organised and have maximum impact where appropriate.

### **OFFICE MANAGER**

- Coordinate the office Day Managers, providing training when necessary.
- Prepare and maintain an office volunteers' procedure manual.
- Have extensive knowledge of the U-MAS registration system and be able to process enrolments, print and distribute information for tutors and conduct searches for information.
- Refer to the Course Administrator all requests for deletion of members from courses or changes in course descriptions.
- Ensure all office equipment is kept in good repair and serviced regularly.
- Purchase office supplies.
- Supply information to the committee as necessary to enable the members to carry out their appointed tasks.
- Train office volunteers in conjunction with the Day Managers.
- Liaise with the Volunteers Co-Ordinator for the roster of office volunteers.

### **MEMBER LIAISON OFFICER**

- The liaison officer shall facilitate communication between the members and the U3A Committee by serving as an official go-between and first point of contact.
- It is the Liaison Officers job to be a Postmaster and forward information received, queries and issues that arise to the Committee and not to act on them alone.
- Receive complaints and recommendations from members of U3A Croydon relating to work health and safety and immediately report them to the WHS officer and Committee.
- Prepare a report for Committee meetings about any queries, incidents, liaisons and identified opportunities that have occurred since the last Committee meeting
- Work with other Committee members to develop and implement solutions to any issues that arise.

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**The following positions are NOT necessarily Committee positions but could be part of a subcommittee.**

### **WEBSITE ADMINIISTRATOR**

- Purchase & update software for all computer equipment in Office & Computer Room when necessary.
- Maintain the website.

### **FACILITIES MANAGER**

The person undertaking this position would be responsible for the management of U3A Croydon facilities, including security, maintenance, and other services, ensuring that the needs of the organisation and members are met.

Facilities Manager would: -

- manage the maintenance of U3A venues and equipment by performing minor repairs, contacting venue operators (eg. scouts, Maroondah Council) or seeking U3A Committee advice.
- support tutors and members by following up promptly on facility issues that arise.
- keep the U3A Committee informed of matters that arising in the course of his work.

### **VENUES COORDINATOR**

- To manage the negotiation of accommodation for classes and the leases associated with the accommodation, and report to the Committee as these occur.
- To check and verify the lease costs, liaise with the Treasurer.
- To liaise with the Course Co-Ordinator on the availability and suitability of a venue for a particular course.
- To maintain a weekly venue usage spreadsheet.
- To liaise with the Facilities Manager on a regular basis and prepare a monthly report for the Committee meetings.
- Locate new venues as required, liaise with the Course Co-Ordinator.
- Maintain details of each venue, its capacity, security requirements, car parking, equipment and furniture.

### **VOLUNTEER CO-ORDINATOR**

- Maintain a register of the details of all members who are prepared to assist, including the skills they are offering to volunteer.
- Liaise with the Office Manager each term to prepare a duty roster for office volunteers.
- Co-operate with the Events Co-ordinator to ensure volunteers with the relevant skills are contacted in sufficient time to assist with all organised events.

- Liaise with Events Co-ordinator re data on Continually 'Active' Volunteers for 10yr/15yr badges etc. presented at AGMs.
- Provide print out of all Volunteer listings from U-MAS for each year as confirmation of Continuously Active Volunteering for future reference if a dispute occurs.

### **PUBLICITY OFFICER**

- Must be computer literate and a good writer.
- Write promotional material and design flyers, etc. on Publisher or other computer programs.
- Replenish advertising material including brochures and newsletters at Croydon Library and Croydon Bowling Club, including local politicians, local community organisations and nearby consenting libraries using the volunteers' distribution system.
- Establish a relationship and liaise with newspapers and radio stations.
- Place electronic advertisements and other items with Maroondah Leader, Seniors News, Fifty Plus News, ChatterBox Newsletter, Radio Eastern 98.1 and Magic Radio 1278.

### **WORK HEALTH & SAFETY OFFICER**

- Conduct annual audits of the Privacy, Workplace, Health & Safety and Risk Management policies prior to AGM.
- Maintain the Register for Incident reports at U3A Croydon.
- Perform all duties related to first aid kits at all venues: replenishing stock, communicate with tutors, etc.
- Perform additional tasks related to the candidate's interests and experience.