



SPEAKER SECRETARIES' REFERENCE NOTES

July 2019

These Notes are intended to be supportive rather than prescriptive and have been prepared by members of the Nottinghamshire Network Support Group.

Note: Some U3As use the works Speaker Finder, Speaker Seeker of Speaker Secretary. For this document we have used the words Speaker Secretary.

Points that need to be considered when seeking and booking speakers for the U3A

1. No member from any U3A can be paid for speaking to any U3A, except to receive reasonable out-of-pocket expenses. See Point 34.
2. Speaker Secretaries (SS) must be committee members as they are responsible for financial aspects of the U3A.
3. Agree a budget with the committee. Should it be annually or per speaker?
4. What types of speakers do the members like? You will not please everyone all the time, so have a variety of speakers over the course of a year.
5. Ensure you have a paper trail of conversations/emails with prospective speakers so that booked sessions can be confirmed, or passed on in the event of a change of SS.
6. Ask the speaker what the talk will cover so that you can tell members in advance (newsletter?).
7. Make the speaker aware of your Equal Opportunities Policy (see Appendix 1 Example 3).
8. Point out to potential speakers that we are non-political and non-religious. It is however quite acceptable to have your local Member of Parliament (MP) who could talk about life before becoming an MP or life in Parliament. You could also have a minister of religion as many of them will have worked overseas. Ensure that you tell you members well

in advance that the speaker will not discuss politics/religion.

9. Take heed of the warning about using solicitors/accountants (see Appendix 2).
10. Avoid speakers who are reluctant to give phone or email contact details.
11. Not all speakers will come up to expectations. Do not take this personally if you have had one who does not.
12. If, at the last moment your speaker needs to cancel at short notice or does not turn up, ensure that you have something ready. It is surprising how many members of your U3A have interesting hobbies or trips they could talk about, so keep a list of those prepared to give short talks. Perhaps two at any meeting. Prepare quizzes in advance or show DVDs if you have necessary equipment.
13. If your speaker brings items to sell, e.g. an author signing books or a craftsman selling bird boxes, these sales must take place after the close of the meeting. U3As are not trading organisations.

How to Find Speakers

14. Members may have heard the speaker elsewhere and thinks they may be of interest to their U3A colleagues.
15. A member of the U3A may offer to speak.
16. Another U3A may offer a member as speaker.
17. A member might see an article in a newspaper about a local person who has done something notable, e.g. walked the Pennine Way, who may be prepared to talk.
18. Speaker Directories can be found on the internet. If you find a suitable speaker from a directory, do ask if they are a U3A member, as they should be aware that they cannot charge a fee, even if they are in a

public directory. Some U3A speakers are not aware of this and it should be pointed out firmly or you do not invite them to speak. See Point 34.

19. Introductions can come via National Office, Regional or Network websites.

The Speaker Secretary Should Investigate the Speaker.

20. If the speaker has indicated that he/she has spoken at another U3A, contact that U3A's SS and ask their opinion.
21. Contact the speaker directly, either by phone or email to find out subjects, distance, fee plus expenses, possible dates. By talking to the speaker, it is possible to form an opinion of him/her. If necessary, seek a second opinion from one of the officers or committee members.
22. Consider whether the subject offered is suitable. It might be inappropriate for the U3A members or for the venue.

The Speaker Secretary Consults with the Committee

23. SS reports to the committee on a regular basis of the booked speakers, especially if a speaker's fee is over the budget.

Contact with the Speaker

24. The SS should keep a record of all conversations, letters and emails with the speaker.
25. The SS sends a letter or email to the speaker with questions about the content of the talk, cost already agreed (does this include expenses), date and time agreed, need for U3A to provide any equipment, e.g. projector or screen, with details of the venue address and the possible number in the audience. There are examples of forms that U3As have developed in Appendix 1, Examples 1, 2 and 3.
26. As U3As often book speakers a year or more in advance, it would be prudent to check four or five months ahead of the booked date to ensure the speaker is still available. Letter or email; keep a note if you

telephone.

27. Two weeks before the event, contact the speaker to confirm details. Exchange mobile phone numbers in case of emergencies on the day.
28. If the SS is unable to contact the speaker at this stage, either by phone, email or letter, check whether there is someone in the U3A who may be able to give a talk. Consider using one of the contingencies (see point 12).

On The Day

29. Make sure a parking space is available if required.
30. The SS should meet the speaker on the day and introduce him/her to the chairman and other members of the committee. Offer tea or coffee and ensure water is available. Talk about the interest groups and if there are displays offer to introduce to group leaders. If they are bringing in equipment offer to help or allocate someone to help, also to help remove at the end of the meeting.
31. The speaker could be introduced to the meeting either by the chairman or the SS.
32. Someone should be allocated to thank the speaker at the end of the talk, possibly the chairman.
33. The speaker is usually paid by cheque on the day. It is prudent to ask the speaker to sign a receipt.

Payment to Speakers

34. The U3A constitution does not provide a U3A with the power to raise funds for another charity that does not have similar charitable objectives to itself. This is a fundamental part of charity law as all money raised by any charity should be spent on its own charitable objectives. Based on our Mutual Aid Principle, no payments are made to members for services rendered to any U3A. The logical conclusion of this principle is that, as a member cannot receive payment for a service

to a U3A (such as a talk at a Monthly Meeting, etc), they cannot suggest a donation to their designated charity from a U3A's account. The only exception to this principle is the reimbursement of reasonable expenses incurred in providing the service. If a non-U3A member nominates a charity to receive the speaker's fee, the U3A is advised not to directly pay the charity unless the nominated charity has similar objectives and the speaker provides a disclaimer of their fee/expenses in favour of the nominated charity.¹

A collecting box for another charity which is displayed and is clearly not a requirement for the event is permissible.

¹ Trust Financial Matters Advice Sheet (June 2019) - Payments to other charities
JULY 2019

APPENDIX 1

Example 1

[NAME] U3A SPEAKER BOOKING FORM	
PLEASE RETURN ONE COMPLETED COPY TO:	<i>[SS'S HOME ADDRESS]</i>
TITLE OF TALK:	DATE: TALK TO START AT: Please note the talk including questions should be 50 minutes maximum
SPEAKER: ADDRESS: TELEPHONE: EMAIL:	
VENUE	<i>[ADDRESS]</i>
A PARKING SPACE WILL BE RESERVED FOR YOU IF YOU DO NOT HAVE SATNAV OR ARE UNABLE TO GOOGLE DIRECTIONS PLEASE LET ME KNOW IF YOU REQUIRE A MAP	
PLEASE STATE YOUR CONNECTION, IF ANY, TO THE U3A MOVEMENT NB NO FEE IS PAYABLE TO U3A MEMBERS	I AM A MEMBER OF U3A OR I DO NOT BELONG TO ANY U3A
PLEASE STATE YOUR FEE AND TRAVELLING EXPENSES	FEE £ TRAVEL £ CHEQUE PAYABLE TO:
IF YOU INTEND TO SHOW A POWERPOINT PRESENTATION PLEASE EMAIL THE FILE TO: <i>[NAME AND EMAIL ADDRESS]</i> AT LEAST 7 DAYS BEFORE THE SPEAKING DATE. WE WILL PROVIDE LAPTOP, SCREEN, MICROPHONES. [WE CANNOT ACCOMMODATE AN OHP OR SHOW SLIDES] IF YOU ARE UNSURE PLEASE CONTACT: LANDLINE	PLEASE TICK WHAT OTHER EQUIPMENT YOU WILL NEED <ul style="list-style-type: none"> • CHAIR X • TABLE(S) X

MOBILE EMAIL	
IF YOU WISH TO SELL ANY GOOD YOU WILL ONLY BE ABLE TO SELL AFTER THE MEETING IS CLOSED <i>[OR SEE ATTACHED POLICY]</i>	PLEASE DETAIL GOODS TO BE SOLD
IN THE EVENT OF ANY OTHER QUERIES OR DIFFICULTIES PLEASE CONTACT:	<i>[NAME AND CONTACT DETAILS]</i>
SIGNED	DATE

Example 2

To:	[SS'S ADDRESS]
	Date

Dear

Thank you very much for agreeing to give a talk to the members of [BLANK] U3A at our meeting on [DATE] at [ADDRESS]

Our meeting starts at [TIME] with formal business and notices followed by a coffee break at about [TIME]. The talk starts at [TIME] and should last no longer than [] minutes (including questions if you wish to take any). The meeting closes at [TIME].

Date of talk:

Title of your talk:

Agreed fee and expenses: £

Please complete and return one of the enclosed booking forms as soon as possible and I enclose a stamped addressed envelope for your reply. Please note that on the reverse of one of the booking forms is our Equal Opportunities policies.

We have excellent facilities at the [church/village hall] including microphones and PowerPoint. Unfortunately, we cannot show slides. If there is anything else that you need to assist you during your talk, please let me know well in advance. We have a membership of approximately [] and regular audiences of about [] members.

I shall make a courtesy call approximately two weeks ahead of your visit to confirm your arrival time and check any last-minute requirements. However, if you are unable to attend please contact me urgently. If there is a difficulty on the day of the meeting, please call me on my mobile number – my contact details are on the booking form.

Please let me have any PowerPoint file at least one week before the meeting so that I can load it onto our laptop.

Thank you once again for agreeing to speak to our members.

Yours sincerely

[NAME]

Speaker Secretary [BLANK] U3A

Example 3

[LOGO] [BLANK] U3A

EQUAL OPPORTUNITIES POLICY

Equality is about ensuring that every individual has an equal opportunity to make the most of their lives and talents and believing that no one should have poorer life chances because of where, what or whom they were born, what they believe, or whether they have a disability. Equality recognises that historically, certain groups of people with particular characteristics e.g. race, disability, sex and sexuality, have experienced discrimination.

[BLANK] U3A pursues an Equal Opportunities Policy and as far as it is within their power to do so, provides equality of treatment to any person in their third age regardless of:

Educational background

Age

Disability

Gender reassignment

Marriage and civil partnership

Pregnancy and maternity

Race (including colour, nationality, ethnic or national origins)

Religion or belief

Sex

Sexual orientation

[BLANK] U3A is committed to the furtherance of fair treatment and the absence of discrimination in all their activities and strives to achieve a membership which reflects the composition of the community they serve.

APPENDIX 2

WARNING SENT TO ALL BUSINESS SECRETARIES IN NATIONAL OFFICE MAILING MAY 2013

It has come to my attention that commercial companies offering free talks on will writing, financial products and equity release, may be targeting U3As throughout the UK. Following the talk, they offer to provide further free advice on an individual appointment basis which takes place at people's homes and it is then that products are introduced and often sold, which may turn out to be entirely unsuitable.

My advice, for obvious reasons, is do not under any circumstances give such people access to your members, even if a speaker/company has been recommended by another U3A. It is often the case that because an individual or a company representative is speaking to their U3A, members think they are being endorsed and are therefore safe.

I know that U3As are generally very circumspect in their choice of speakers, but I have recently been made aware of some worrying situations which have occurred following talks of this sort, hence this warning.

Lin Jonas

*CEO 1996-2016
The Third Age Trust*