

TUTOR HANDBOOK GUIDELINES

Version 2

Updated June 2018

Recognising that the role of tutors, is pivotal to the success of a U3A, a workshop of Course Coordinators was held in late 2014 organised by the Network Education Committee to develop a handbook designed to support U3As and their tutors, class leaders and facilitators. These guidelines are designed to support what is a demanding, challenging and satisfying role.

This publication builds on the workshop ideas of possible purposes, uses, contents and examples of their material. These are only guideline suggestions for U3As considering developing a tutor handbook, or it can provide ideas for those who wish to review and revise an existing document.

Throughout the document the generic term 'tutor' is used to cover the broad range of titles and responsibilities in delivering a U3A program including 'leader', 'facilitator' and so on. These guidelines are necessarily general in nature given the diversity of U3As and their various histories, challenges, strengths, personalities, nomenclature, procedures and practices. They are also extensive. Do not be daunted – select from the guidelines and suggestions, and from it develop a handbook that meets your U3A's particular requirements.

Because the procedures and arrangements made by each U3A may change over time, the format and content of a tutor handbook needs to allow for alterations without the need to re-publish the complete document each year. It is suggested that the date that each section was updated be included at the bottom of the page so that it is clear which is the most recent version. Many U3As prefer a loose leaf format where alterations can be made to the sections and where changes have been made. Some U3As use diagrams and photographs to good effect and include blank pages for notes by tutors.

A copy of this updated document can be downloaded at:

www.u3avictoria.com.au/members-information/

Our thanks to the generous support by Course Coordinators and their U3As in sharing their experiences and their resource material that laid the foundations for this updated Tutor Handbook Guidelines. Thank you to the members of the 2018 Network Education Committee for updating this document.



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A. FIRST STEPS

Before you start!

Time needs to be spent on thinking about the presentation of this document as it represents your U3A's relationship to your tutors.

Some questions you may need to think about:

- What writing style will be used, for example, personal – 'our', 'we', 'your', or written in the third person, 'the U3A', 'as a Tutor'?
- What size document is appropriate?
- Will graphics or photos be used?
- Will anecdotes be used to illustrate a point?
- What font will you use? Arial, Times New Roman, and so on?
- Does the cover reinforce the aims of the document?
- Does the format fit in with your other publications?
- Does the handbook reflect the culture of your U3A?

The cover

The design of the handbook cover is important as it begins the engagement with the tutor.

The cover can include:

- U3A name and logo
- Title of publication, such as Advice for Tutors, Class Leaders Handbook, and so on
- Photos or graphics related to the U3A.

Title page

The title page includes the information from the cover, such as the title, logo and U3A name:

- Contact details of the U3A
- Email address and postal address
- Website URL
- Phone number(s)
- Facebook, Twitter, and so on
- Authorship of the document.

B. INTRODUCTION

Leaders of the U3A such as the President or Course Coordinator welcome tutors and provide appropriate introductory information and encouragement to the tutors who have offered to lead and coordinate courses.

This section includes:

- The Mission Statement of the U3A
- A short history and general philosophy of the U3A movement as a whole, U3A in Australia, U3A Network, Regions and the particular U3A so that tutors understand the context within which they are participating
- Introduction to the Handbook - its purpose and format
- Welcome and thanks to tutors and acknowledgement of their importance
- Commitment and overview of support and help available to tutors
- Reminders of the important aspects of the U3A's Mission Statement, the nature of the organisation and the characteristics and expectations of members
- Brief overview of the current local context – number of U3A members and courses offered, and major policies of relevance
- Mention of relevant aspects of the broader Network and Government context
- Future U3A projects of interest, such as. Seniors Festival, Summer School
- Alerting tutors to important U3A policy guidelines.

C. ROLES, RESPONSIBILITIES AND RIGHTS OF THE TUTOR

This section provides advice on the role of tutors as it has evolved in your U3A. The purpose of the statement is to provide helpful guidance to new tutors and to encourage existing tutors to revisit their critical role in the success of their U3A's courses.

The title 'Tutor' is often used to describe the role of these important volunteers in U3As, however it is not the only title U3As use. Depending on the type of course being run, the title can be, for example, course leader or facilitator or organiser.

Tutor roles

- Teacher or Instructor.

This role is usually carried out by an experienced, knowledgeable person in a particular skill or content area, such as. yoga, geology or other science, painting, Italian (or other language), computer skills. In addition to the specific knowledge or skill concerned, the course benefits from some level of adult teaching skill. No qualifications are required unless it is felt necessary in some physical activity or first aid type courses.

- Discussion Group Leader.

This role requires substantial background knowledge and understanding of the subject area, but also skills in leading a discussion so that people feel challenged but comfortable in being actively involved. It needs the skill of judging where the discussion is going, how to guide it, how long to let it run, how to dampen down dominators and draw in reticent members. Examples of such courses are Book Club, Current Affairs, Literature, Art Appreciation, and Arm Chair Travel.

- Facilitator.

This requires organisational and marketing skills and the ability to select sufficiently stimulating and informative speakers, DVDs or destinations. For example, classes such as monthly guest speaker, theatre outings, concerts, and garden visits. It may involve the preparation of flyers and other promotional material for the course. The facilitator may be the front person to introduce the speaker and guide the group. For excursions it helps if the facilitator has been to the venue beforehand and has an understanding of first aid.

- Activity Groups Organiser

This requires organisational and group management skills, but not necessarily any specific subject matter knowledge. For example, table tennis, bowls, chess or other games, clubs, gardening, cooking, line dancing, and walking or hiking.

- External Course Coordinator.

This requires the coordinator to have organisational, management, marketing skills and perhaps the experience of doing the external course being offered. Examples of such classes include MOOCS, U3A Online, distance education courses, Great Courses DVDs, Open University, Froggyspeak and other free programs.

Tutor Responsibilities

Tutors are the life-blood of a U3A and should be recognised as very important volunteers. They have a responsibility to:

- Be reliable, accountable and committed
- Undertake the agreed program or course responsibly and ethically
- Respect confidentiality

- Request support from class members and the organisation when it is needed
- Value and support other volunteers
- Ensure they are fully aware of all issues concerning Occupational Health and Safety (OHS) and in particular, evacuation and emergency procedures
- Know the relevant policies such as copyright, taking photos and grievance procedures.

Tutor Rights

The handbook would acknowledge that tutors have rights such as:

- A healthy and safe work environment
- Reimbursement of U3A associated out-of-pocket expenses
- Consulted and informed on matters that directly and indirectly affect them as a tutor
- Access to grievance procedures, if necessary
- Support to undertake their role as tutor by orientation and professional development opportunities.

Sharing the Tutor Workload – Class Administrators, Class Monitors

It is important to stress that although the ultimate responsibility for the successful conduct of classes resides with the tutor, much of the work and many of the functions of a tutor can and should be shared with other class members. The shared responsibilities can range from joint leadership of the class, tutor assistants, course administrator, to members who support the tutor in making arrangements for the class, such as room setup, obtaining and using technology and keeping records of attendance, money collected and so on.

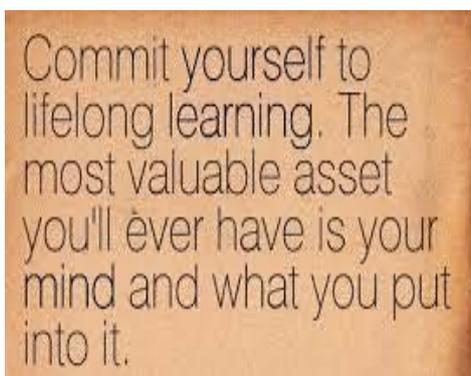
Appointing a class administrator is often one of the first steps at the first meeting of the class. Sharing the functions of the tutor can lead to a reduced and fairer workload for tutors while class member ownership is enhanced.



D. DATES TO REMEMBER

Dates of importance for tutors and class members are detailed. For example:

- Term, half-year, yearly or semester beginning and ending dates depending on the U3A calendar.
- Holidays and special dates such as –
 - Orientation for new members
 - Public holidays
 - Regional celebrations
 - Annual General Meeting
 - Seniors Festival
 - Tutor luncheons
 - Re-enrolment for tutors
 - Showcases and celebrations for particular classes
 - U3A Network training, Region training.
- Tutors' meetings dates such as –
 - Tutor support meetings, group and one-on-one sessions
 - Tutor luncheons or dinners.
- Newsletters and other communication forms -
 - Copy deadlines
 - Tutor uses of the newsletter and other communication forms such as websites, Facebook, Twitter and email.



E. IMPORTANT CONTACTS AND SUPPORT GROUPS

Contact details (name, phone numbers, email and sometimes photographs) of office bearers and other service personnel and groups of use to tutors in your U3A are provided with their permission. The size and complexity of your U3A will determine the number and nature of contacts listed. Possible contacts to be listed include:

Office bearers and special support personnel -

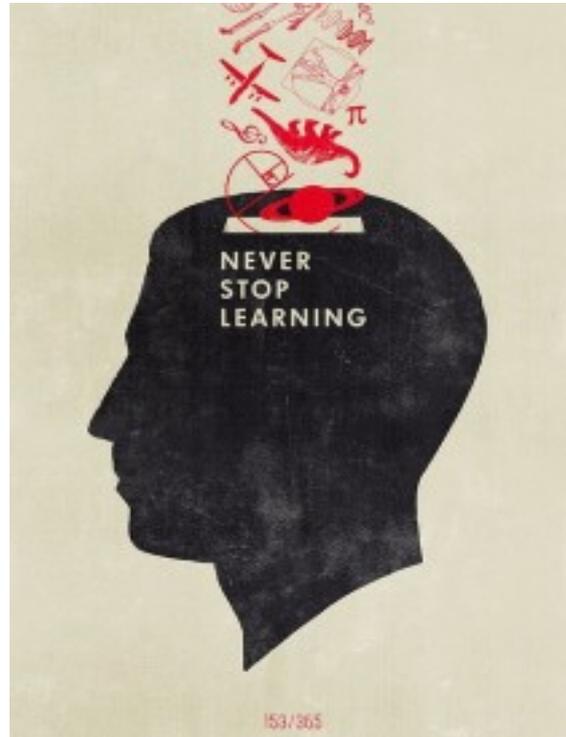
- President
- Vice President
- Secretary
- Treasurer
- Committee members
- Curriculum / Course Coordinator
- Tutor Coordinator
- Office administration
- Communications, Newsletter Coordinator
- Equipment purchase
- Maintenance contact
- Enrolment and data management
- Digital technology support
- Occupational health and safety.

Further contacts and information of importance to tutors -

- Accommodation and class venues
- Class representatives liaison / administrator
- Correspondence / member records
- Course changes / timetables
- Enrolments: Class lists /waiting lists
- Trainers for particular courses, for example, English as a Second Language
- Newsletter editor
- Webmaster
- Office manager
- Publicity and marketing
- Room and venue bookings
- Tutor needs / training
- Other tutors in the same subject area
- Welfare support.

Communication Methods

Methods of contacting U3A personnel and groups need to be negotiated. In most U3As permission will be given to include telephone and/or email details in the handbook. Others may prefer to be contacted via office pigeonholes or direct personal contact at specified times. Some tutors keep in contact with their class members using internet-based social networking procedures such as Google Circle, Facebook or Twitter.



F. CLASS OPERATION AND PROCEDURES

U3A and tutors require clear information from each other on the current administration and operation of classes. The management of the interaction between both parties is at the heart of a healthy U3A and a contented tutor.

1. General class administration

Class venue and accommodation

- Venue details such as keys and where they are kept, emergency exits, facilities and resources available in the room, toilets, tea and coffee availability, cleaning requirements, lock up requirements, maintenance needs and reporting, car parking
- Room booking requirements
- Room setting up and leaving requirements
- Contact details for reporting any maintenance issues such as. blind sash breaks, air conditioner problems.

Equipment and technology

- Booking protocols
- Technology booklet with photos of equipment and set up procedures
- Technology training schedule
- Contact for technology and equipment support
- Disability support aids e.g. hearing loops
- Guidelines for using the U3A communication channels
- U3A website
- Facebook and twitter accounts
- Newsletter deadlines and editor contact details

Class membership

Most class membership is straight forward from the U3A enrolment process but there are other types of membership:

- Prospective members of U3A or of the tutor's class might be given the opportunity to participate in a tutor's class for a few trial sessions in order for the person to decide whether they will either join the U3A or that class, a 'try before you buy' scenario
- Some language classes, short-term classes or special skill classes don't allow new members to join in half way through the course. These provisions would need to be negotiated with the tutor
- Status of Life Members
- Offer of places in class for non-members, such as when courses are conducted in venues such as retirement villages, where there is a special community outreach program
- If a class has a waiting list, the tutor will need to know who to notify should a vacancy occur.

Class timetables

- Details of the current timetable and course information
- Procedures for changing timetable and course information
- Copy of timetable for tutor handbook
- Information on where the timetable and course information can be found within the U3A. Often a tutor becomes the conduit for the U3A about the activities and other

courses within the class. Word of mouth information from tutors becomes a part of a U3A marketing strategy.

Record keeping procedures and practices

- **Class Attendance:**
Information on how attendance is captured plus the arrangements for the transfer of this information to the U3A is a vital part of running a course. This collection may be done on-line or by paper. Tutors need to understand that the roll provides a vital piece of information for the U3A and therefore roll marking needs to be an integral part of each class meeting. The information is used for identifying non-members, insurance purposes, moving people from waiting lists, identifying welfare issues, statistics for reports, and so on.
- **Contact information collection:**
Name and details of class member's preferred contact details in emergency situations to be passed on to the tutor.

Payments and fees

- **Extra costs for class members:**
Tutors need to have an understanding of the U3A's policy on extra fees being requested from class members. Fees might need to be collected for photocopying, craft items, sporting materials and equipment, excursions.
- **Tutor petty cash:**
Some U3As have money for tutor's discretion capped at say \$25.00 per course. This can be used for extra materials, social occasions, catering, and so on.
- **Payment arrangements:**
How monies are to be paid to the U3A need to be communicated, such as cheque, cash, bank transfers
- **Expenditure and reimbursement procedures.**

2. Miscellaneous administration matters

- Any important changes from the U3A Administration, for example, new policies or changes to management
- Note to tutors that from time to time there will be requests to tutors for information, photos or exhibits for the website, publications or special events, such as the Victorian Seniors' Festival.
- Class cancellation protocol for temporary or permanent cancellations.

3. Managing an effective and enjoyable class

Well-being and safety issues and procedures

- Awareness of members with special needs, such as hearing impairment, vision, language challenges and mobility
- Class member identification, for example, members required to wear ID cards whilst attending classes and other planned class activities
- Emergency medical contact details for class members. For example, some U3As have this information on the back of their ID card
- Medical emergency procedure guideline, for example, if the situation seems serious to dial 000 for an ambulance then contact the office
- Location of first aid kits, emergency equipment and exits

- Grievance and dispute procedures, such as incident report forms to be completed by tutors. Grievance report forms available to class members including an agreed process to address the reported grievance
- Safety protocols for a particular course outlined
- Insurance arrangements explained, for example, U3As often have insurance cover for volunteers in the course of performing voluntary work for the U3A such as tutors and class facilitators. Public liability should cover classes in rented venues
- Incident report form discussed
- Emergency evacuation procedures, including evacuation maps and instructions displayed in each classroom
- Mobile phone use in class
- Attention to ventilation, extraneous noise, hearing and vision issues. For example.. in a class a question from the floor is repeated by the tutor or respondent
- Clarification of name of class member to be used
- Provision of hearing equipment.

Communication with class members

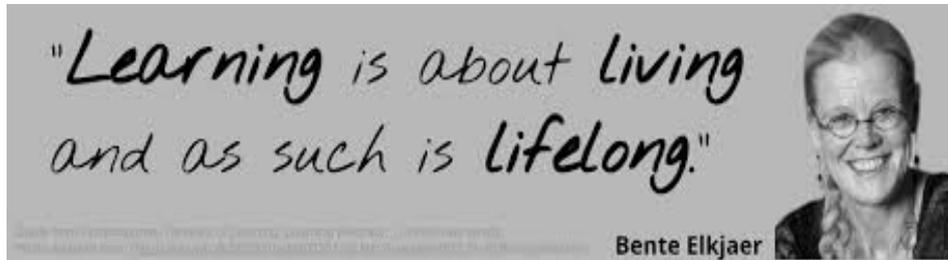
- Class members' communication with each other. The foundation of class communication is respect. This is usually outlined in a new U3A's 'Code of Conduct'. Tutors usually refer the class to these standards at the beginning of each new course
- Class member communication with tutors out of hours, such as email, phone number
- Display of member names in classes, for example, nametags. Experienced tutors find ways to ensure it is not only the tutor who knows participants' names but the class members know each other
- Emergency procedures identified, for example, first-aid kits, illness, fire alarm drill
- Taking photos of class members. There may be permission for photo taking of classes in the membership form. However, it is recommended that whenever photos are about to be taken of the class, verbal permission at the time be sought with an explanation as to what the photo will be used for
- Verification of attendance sheet information
- Encouragement of feedback to improve the course.

Policies

- Code of Conduct
- Privacy – medical information
- Copyright
- Permission to take photos of membership
- Safety information
- Incident reporting
- Basic OHS guidelines
- Discrimination, harassment and bullying
- Conflict of interest

Tutor Training

Tutors should be encouraged to take up training opportunities linked to their subject areas or content delivery. Tutor training arises in various quarters, for example U3A Network, region workshops, subject area organisations, tertiary institutions.



G. MAKING CLASS ARRANGEMENTS FOR LEARNING

Many tutors will not have previous teaching experience and learning to teach is a rewarding benefit itself for U3A tutors. It is appropriate to offer suggestions to tutors of ways to make their classes effective, interesting and enjoyable. Tutors who do have teaching experience may also appreciate hints to improve their presentations, particularly in adult learning practice. U3As continually seek to improve the learning and social experiences of members.

General U3A principles to ensure the tutor promotes enjoyment and effective learning:

- U3A has a commitment to promoting *lifelong learning* for our members
- The best and most enjoyable learning occurs when class members are *active* and *participating*
- *Learning together* in groups with other U3A members helps sustain and build social relationships and enhances learning and well-being
- If the class members do not learn and enjoy the classes the way we teach them, then we should *teach the way they learn*
- It is important to acknowledge and use the knowledge and skills of the *diversity of learners* in our community
- Remember: In U3A classes the tutor and class members are *all teachers* and *all learners*.

Decide learning approach to be used:

- Lecture / presentation
- Discussion
- Workshop
- Exploration and inquiry / self help
- Games /activities
- Field trip / excursion.

Of course, a combination of learning approaches can be used in one session or in different sessions throughout a course.

Consider ways to cater for and use the individual differences/diversity of class members.

Consider class members':

- Expectations – What they would like to know more about and be able to do
- Capabilities – What they are capable of doing and achieving
- Preferred learning style - The ways they prefer to learn, for example through listening then discussion; visually through videos and diagrams
- Backgrounds, such as previous and current occupations; ethnicity and culture; language; interests / hobbies
- Previous experiences – What they can contribute to the class.

Arrangements the tutor makes before, during and after sessions to ensure an enjoyable and successful class for all:

- Provide appropriate seating / table arrangements
- Check the general environment of the class venue, including acoustics (consider aids for hearing impaired), light levels, heating and cooling, noise levels

- Prepare teaching resources including setting-up computer technology / audio-visual equipment.
- Questions for the tutor to ask before the class:
 - What content will I include?
 - How will I structure the content for this group?
 - How will I get to know the class members and help them to feel comfortable with each other?
 - How will I match the content to class members?
 - How will I actively engage all class members?
 - How will I obtain the interest and involvement of class members?
 - How will I obtain feedback on class member response and learning both during the course and at the conclusion of the course?
 - What handouts / teaching materials will I need?

Address the social needs of class members as they learn and link with each other.

A major reason for joining U3A is a need for social connection with others. The tutor plays a pivotal role in establishing a climate where class members enjoy their time learning together, have their wellbeing nurtured and have the opportunity to meet other people:

- Plan to have opportunities for class members to talk, learn and socialise with one another, for example, plan a special excursion or term end lunch
- Promote a friendly climate
- Help establish friendships and social interaction in the class.

Establish guidelines and protocols for the class, for example:

- Allow and give no 'putdowns'
- Accept where others 'are at' in all aspects of their class involvement
- Encourage cooperation
- Attend to others and actively listen
- Model qualities such as respect, helpfulness and cooperation.

Expect and celebrate differences in class members in their:

- Availability and openness to be involved
- Life and career experiences
- Confidence and motivation
- Knowledge and skills
- Language skills and cultural background
- Physical capabilities and needs.

Some things to consider...

Many U3As refer tutors to the book 'Adult Learning Principles' by Malcolm Knowles. Some of his advice is as follows:

Adults are **autonomous and self-directed**. They like to direct their own learning, to be actively involved in learning and work around their specific interests and personal goals. Generally, they like to take on leadership roles.

Adults bring **life experiences and knowledge** to learning experiences. This may include work-related activities, family responsibilities, and previous education.

Adults are **goal-oriented**. They like to know what the session is about and how it relates to things of importance to them.

Adults are **relevancy-oriented**. They need to see a reason for learning something. When they see the applicability they also see the value in the experience. Theory needs to be related to practical experiences.

Adults are **practical**. They like to be able to apply their knowledge.

Adult learners like to be **respected**. They bring considerable life experiences to their classes. They like to be treated as equals, to voice their own opinions and to have a role in directing their own learning.

H. SUPPORT AND ASSISTANCE

For some U3A members the thought of being a class tutor is daunting and even continuing tutors are in need of support on occasions as they plan to change their courses to provide better learning for members or respond to the challenge of a difficult class member. It is important to extend the offer of support, assistance and encouragement to tutors and ensure that they enjoy their role.

Providing Information

Arrangements made to provide support to tutors with the provision of vital information and the opportunity to discuss issues and share ideas. These could include:

- Regular tutor group meetings
- Tutor seminars and workshops, such as training in the use of newer technologies
- Individual tutor support through mentoring arrangements
- Linking tutors with tutors in other U3As who conduct similar courses.

Providing Support

Arrangements made to support tutors in their class leadership and teaching, such as:

- Assistance in setting-up and using the newer digital technologies
- Availability of internet connection and Wi-Fi
- Assignment of class helpers for the tutor, such as class representatives, tutor assistants, member record keeping
- Back-up tutors in the event of tutor unavailability
- Contact information of key U3A members with experience in tutoring
- U3A Committees, for example Curriculum / Course Committee.
- Tutor Liaison Officer / Course Assistant.

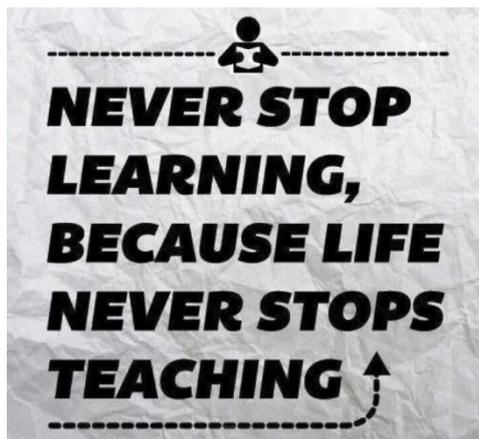


I. RELEVANT U3A POLICIES AND GUIDELINES

Policy guidelines that can be accessed through the U3A Network website include:

- Occupational Health and Safety
- Copyright
- Anti-discrimination
- Member privacy
- Conflict of interest.

The U3A Network website is at www.u3avictoria.com.au



J. APPENDICES

U3A Network Victoria has a number of documents that may be useful or of interest to tutors. These include the Network Reference Manual, a report on the history of the U3A movement, and others. Please contact the U3A Network office for advice on further material via info@u3avictoria.com.au or (03) 9670 3659.

