

Crawley u3a Trustees Induction Checklist (1st December 2025)

Legend

Green underlined text indicates a Third Age Trust website/document

Purple underlined text indicates a Charity Commission website/document

Blue text indicates a Crawley u3a website page and **Blue** a Crawley u3a document

	Action	Check
(A)	Third Age Trust (TAT) Trustees' Basic Introduction	
1	Start with this site on the TAT website: https://www.u3a.org.uk/members-area/info-for-new-u3a-trustees This menu button "members area" is intended for Trustees of "member" organisations (individual u3as, whereas the rest of the TAT website is intended for current and potential u3a members, and external bodies.	
2	Go through https://www.u3a.org.uk/plays-downloads/trustee-responsibilities-2 Note this references some key documents also covered in Sections (B) & (C) below	
(B)	Charity Commission and Trustee Responsibilities The following two documents (referenced in the TAT documents above) should be studied (the 1 st is a basic introduction, the 2 nd much more detailed):	
3	https://www.gov.uk/government/publications/charity-trustee-welcome-pack/charity-trustee-welcome-pack	
4	https://www.gov.uk/government/publications/the-essential-trustee-what-you-need-to-know-cc3/the-essential-trustee-what-you-need-to-know-what-you-need-to-do	
5	Read the following 5-minute guides and then test your knowledge with the short quiz at the end: https://beingacharitytrustee.campaign.gov.uk/	
6	At the 1 st trustees meeting after every AGM all Trustees, new and continuing, are asked to sign the CC Trustee eligibility form: https://assets.publishing.service.gov.uk/media/6023fe37d3bf7f70c4310b35/Trustee Declaration Form Fields December 2020.pdf	To do on 8 th Jan
(C)	Third Age Trust Information on matters common to all u3as	
7	The Members Information document on the Admin page of the website is a useful basic summary (taken from different parts of the TAT website) now given to all new Crawley u3a members	
8	Essential Documents for Trustees on the Admin>For Trustees page includes the key TAT documents concerning Trustees	
9	At the 1 st trustees meeting after the AGM all Trustees are asked to sign the Trustee Code of Conduct (last part of the Essential Documents for Trustees)	To do on 8 th Jan

10	<p>Read https://www.u3a.org.uk/all-documents/terms-of-membership-of-the-third-age-trust.</p> <p>Whoever submits the end March Annual Return to the TAT (normally the Secretary) has to confirm that Crawley u3a adheres to these terms</p>	
11	<p>To best understand the Charity Trustee Management Liability Insurance Cover read Section 3(d) of Insurance Guidance under Admin>General Admin</p>	
12	<p>Note that on https://www.u3a.org.uk/members-area/support/advice-and-guidance there is a whole raft of useful documents & templates, some of which you will have already come across.</p> <p>But whilst we are obviously obliged to follow the TAT guidance on legal matters and those which are non-negotiable as far as the TAT is concerned (those covered in the Terms of Membership), we are not obliged to follow those on others matters - such as the Role Descriptions - where they are intended more as useful templates to be adapted to the needs of individual u3as.</p>	
13	<p>The TAT is fussy about what logos we use – we try to adhere to the guidelines https://u3a-shop.co.uk/brand-publicity/ but it is obvious from looking at some u3a websites that not all u3as do.</p>	
14	<p>Consider signing up for one of the zoom Workshops listed on https://www.u3a.org.uk/members-area/info-for-new-u3a-trustees</p>	
15	<p>For information on the Governance of the TAT see https://www.u3a.org.uk/about (not the most obvious place to look for it). The arrangements have recently changed substantially, so should hopefully now remain stable for a while. More on Governance is included on: https://www.u3a.org.uk/members-area/trust-and-board-updates</p>	
16	<p>Officers should automatically receive Committee mailings https://www.u3a.org.uk/members-area/member-communications/mailings once their details are entered into the u3a Portal</p>	ML to do shortly
17	<p>Familiarise yourself with the rest (i.e. menu items other than Members Area) of the Third Age Trust website https://www.u3a.org.uk/</p>	
18	<p>There is wide diversity across individual u3a organisations, in terms of size, types of Activity (Interest) Groups, Committee structures etc and it can be useful and interesting to see how others do things. See https://www.u3a.org.uk/get-involved/find-your-local-u3a to see the map of u3as in the UK, and by expanding the map and clicking on individual u3a buttons you can access their websites.</p>	
(D)	Crawley u3a Documents & Procedures	
19	<p>Note that these procedures & documents have been developed by past Crawley u3a Committees (Boards of Trustees). Future Committees may wish to do things differently (to the extent the law and the Third Age Trust permit)</p>	
20	<p>Familiarise yourself with the structure& content of the website https://crawley.u3asite.uk</p>	
21	<p>Go through the last couple at least of the Quarterly Committee Papers and Trustee Progress Reports to familiarise yourself with recent pre-occupation. https://crawley.u3asite.uk/committee-reports/</p>	

22	<p>If you have not had recent experience running a Group then you need to familiarise yourself with the contents of the Group Leaders handbook on https://crawley.u3asite.uk/for-groups/</p> <p>Also take a look at the last couple of Group Leader meeting reports on https://crawley.u3asite.uk/group-reports</p>	
23	<p>The key policies are listed in https://crawley.u3asite.uk/general-admin/. As Trustees, you need to be particularly aware of the contents of the Finance Policy and Financial Policy – Delegated Decisions.</p> <p>More policies are listed on https://crawley.u3asite.uk/information-documents-for-members/</p> <p>A complete list of policy documents – showing those which require updating – will be issued before the 8th January meeting.</p>	
24	<p>Read through our Committee Procedures on https://crawley.u3asite.uk/for-trustees/ It might seem over detailed, but all content was drafted as a result of problems experienced at some point.</p> <p>Note that Trustees Task Lists, referred to in these Procedures, will be issued before the 8th January meeting.</p>	
25	<p>Make sure you know how to claim any expenses – by completing one of the expense forms on https://crawley.u3asite.uk/accounts-forms/ and submitting it to the Assistant Treasurer – payments.</p>	
26	<p>For new Trustees other than General Trustees, meet with your predecessor to undertake a role handover.</p>	
27	<p>For new Trustees other than General Trustees, meet with any relevant support roles for your role</p>	
28	<p>Be aware of who holds the various Support Roles, and where vacancies exist</p> <p>https://crawley.u3asite.uk/volunteers/</p> <p>To be covered on 8th January?</p>	
(E)	Access to Crawley u3a Systems & Tools	
29	<p>Ensure you are added to the Crawley u3a Trustees Whats App group</p>	All added 30 th Nov
30	<p>If you are not already a member consider joining the two Facebook pages: https://www.facebook.com/groups/CrawleyU3A and https://www.facebook.com/groups/2005741926498409</p>	
31	<p>Contact the Beacon Administrator to arrange access and training</p> <p>Recommend you leave this until after 8th January</p>	

Margaret Lloyd, 1st December 2025