

Appendix G: Guidelines on Funding for U3A NR Course Resources

AIMS

U3A NR endeavours to ensure that tutors have available the necessary resources that support their class's learning. The purchase of support materials and/or equipment will be considered by the U3A NR Committee on request from the class tutor.

PRINCIPLES

Requests for expenditure on course resources will be considered by the U3A NR Committee on a case by case basis according to the following principles:

- All such requests are to be made by the class leader in writing to the committee and be co-signed by a majority of class members.
- The request is for durable capital items – not for consumables
- The request is for a class that has both a history of sustainable class numbers and where there is an intention for the class to continue in subsequent terms

PROCESS

Where a request is deemed to meet the above principles, the request will be considered in accordance with the following process:

- A fixed proportion of U3A NR's annual income (15%) will be put aside in the annual budget to provide for the purchase of class specific resources. The Committee may change this proportion or cease grants in any particular year if it believes that U3ANR's financial position warrants such changes.
- On the basis that only $\frac{2}{3}$ of the membership is actually active in any one year, an individual's proportionate annual allocation towards the purchase of class resources is calculated as

$$= \frac{\text{Total budgeted amount for class resources}}{\frac{2}{3} \times \text{Total Membership Nos.}}$$

These figures to be based on the reporting from the previous financial year.

- The class allocation is then

$$= \text{Individual annual allocation} \times \text{average class numbers}$$

Where a resource has an expected 'life' of several years (which is likely to be the situation in most cases), the class allocation may – at the discretion of the Committee – be multiplied by the expected life of the resource.

If a class had so few members that its class allocation was less than the cost of the resource required, allowing for use over a number of years, the Committee may either decide to subsidize the class anyway or may require the class members to raise the extra funding themselves.

All resources bought under this policy will become the property of U3ANR.