



BOLTON u3a GROUP LEADERS' HANDBOOK

(Updated July 2023)

Boltonu3a was formed in 1991 and is one of over 1,000 U3A groups in the UK. It started with a handful of members and 2 interest groups. We now have a membership of over 300 and run 30-35 interest groups. Like all local u3a's, Bolton is a member organisation of the Third Age Trust (TAT), the national support and advisory body.

All u3a's in the UK are 'operationally independent' - self-help organisations run by the voluntary efforts of their members and one of the most important aspects of such voluntary work is the role of Interest Groups, which are run by members but there is always help and assistance available from the TAT and/or local members. Members who found and run such Interest Groups are much appreciated and will be given every encouragement and assistance in the formation and the running of the Group.

Group Leaders and regular attendees of the groups should be current u3a members. Attendees who may not be current U3A members, are allowed either 1 "taster" session at a maximum of 2 groups, or a maximum of 2 "taster" sessions at 1 group (at which they must pay the usual attendance fee) but must pay their annual membership (or pro rata at the current rate as detailed elsewhere) if they wish to continue attendances at the Group.

Before starting a new group, a potential leader should contact the local Group Leaders Co-ordinator (GLC) - see Contact List at end of this Handbook - explaining what the subject/theme of the group will be and what will be required by way of venue and equipment. Once the initial proposal has been discussed with the GLC, it will go before the committee for approval and any future changes will also have to be approved by the Committee in advance. It should be stressed that, if you have an idea for a new Group, you don't have to be an expert in the subject - there may be other members interested but not necessarily experts either, but who are interested in exploring a particular subject. It is recommended that, for a Group to be viable, it should try and maintain an average attendance of at least 6 members.

The frequency of meetings (which is usually once or twice per month, dependent on the topic) should be discussed with the GLC as should the anticipated start date and intended duration of the course, which may be "open-ended" or for a specific period (say 6-10 weekly or monthly sessions - there are no hard and fast rules). If the Group is only intending to run for a short period, say 6 sessions, on a "pop-up" basis, then it would be feasible for it to meet weekly for its duration. It is not unusual for Group Sessions to break in July and August for holidays, and also in December, over the Christmas period, but not necessarily - it all depends on the individual leader and Group members.

Once agreed, the date/time of the new group will always be advertised in our monthly Newsletter until such time as the group ceases to operate so that once the group is up and running, you will be contacted direct by interested members. An announcement about a new group's formation will also be made at the general monthly meeting, to give it as wide publicity as possible, and it will also be detailed on the website. However, it is the Group Leader's responsibility to send details of the first meeting, and any changes to its format, to the Newsletter Editor for entry in the next issue. Please be aware of the deadline for entries

which is no later than the 3rd Wednesday of the month. Unless any details in your entry change, the Editor will automatically include your entry in future Newsletters without need for further contact. You could even supply the Newsletter Editor with a schedule of the Group's meetings/topics, to avoid a monthly report.

Venues:

To facilitate access for members, it has been advisable, historically, to use town centre venues but recent changes in Local Authority policy and the closure of some central venues by the owners, has meant that some of our once-favoured venues are no longer available. However, there are suitable rooms still available at The Hub in Bold Street (Council run), at St George's & St Andrew's United Reform Church and Friends' Meeting House. The Committee is always keen to hear of other potentially suitable venues that we can use at a reasonable cost and if you do know of such a venue, please contact the Venues Co-ordinator, Janet Thatcher, whose details are to be found on the Contact List. Of course, it may be possible for a Group to meet at the home of the Group Leader or at the home of a group member.

Insurance cover:

An 'All Risks' policy, taken out through the TAT, is in place covering all U3A equipment wherever it is in use in the UK. There is also Public Liability insurance in place up to a limit of £10,000,000 any one claim which indemnifies all Group Leaders, individual members, as well as the parent u3a, in the event of a claim for injury &/or loss/damage to property occurring during an activity organised as part of a U3A activity, wherever that activity occurs in the UK. TAT recommends that all u3a's should keep a log of accidents/medical or other incidents which may occur during a Group's activities (see specimens at end of Handbook). Any completed report should be submitted to the Committee, via the GLC, for it to be dealt with appropriately.

There are also Public Performance and Copyright Licences in force to allow for playing of recordings and photocopying of documents, should this be necessary.

Preparation for your first Group meeting: -

- Be aware of safety issues at the venue. Following an in-depth review of all the venues that are used, a sub-committee has drawn up an Emergency Evacuation Procedure checklist for you to use prior to the commencement of your Group sessions. (Please contact the GLC, or any other Committee member should you wish to see the full review of the premises that you intend using.) Several of our venues have safety procedures in place and you should adhere to these but, in the event of there not being one - this checklist, detailed at the end of this Handbook, will assist you. You should inform members of the venue's safety procedures prior to any meeting - pointing out fire exits etc.

- Keep a register (see attached) of all attendees, also indicating amount of monies collected from them, and any expenses that you incur (if in doubt, you can discuss with the GLC what constitutes a legitimate expense, should you be unclear) .
- Provide refreshments - this will depend on venue as some will include tea/coffee in the rental charge, others may not and so additional arrangements may have to be made and you may need volunteers to provide refreshments (on a rota basis?)
- If equipment is needed for your topic (projector, CD player, laptop, keyboard etc), Bolton u3a has some equipment that is available for your use and, for more specialised equipment (and literature of a more detailed and/or technical nature), there is always guidance and advice from TAT on the more popular subjects, advertised in the magazine, Third Age Matters (TAM). Group Leaders are encouraged to register for assistance on the national u3a website (www.u3a.org.uk), via the resource centre.

Day-to-day running of the Group

Remember to collect the attendance fee from each member at every meeting - the attendance register can include this aspect. The attendance register should be submitted to the Treasurer on an annual basis, and all records will be retained for a period of 6 years. The register can be submitted via the GLC along with a brief report on the Group's activities during the year, for inclusion in the AGM documentation.

From the total amount of attendance fees collected, you may take monies for routine expenditure (refreshment expenses etc). The net, collected, monies should be passed on to the Treasurer once you have collected over £50, and you will be provided with a receipt for such payment - this receipt should be kept with the register, to assist with your accounting record. You may pay such monies online (contact Treasurer for our bank details), in person (for example, at the general monthly meeting) or by post to him/her. You are not recommended to retain more than £50 of U3A monies at your home address, as there may be insurance implications. You should keep a record of all expenditure, to assist with accounting procedures.

Should there be an "incident", happening during the course of one of your sessions, whether it involves physical injury/damage or other, it is recommended that an 'Incident Report Form' be completed and submitted to the Committee via the GLC, detailing circumstances of the incident and specimens of such a form are attached.

It is recommended that you be made aware of any individual health problems of any Group member at the start of your Group's sessions. Members are asked to carry with them, at all times, their membership card which should detail their "Emergency Contact". So, in the event of any problem you are not at a loss as to who should be contacted immediately. A reminder to your members to that effect would not go amiss!

Please contact the Group Leaders' Co-ordinator, should there be any difficulty or problem with the running of your Group. We are very appreciative of your initiative and willingness in

becoming a Group Leader, and remember that you will be given every encouragement and support in the running of your Group. As part of that support, twice a year there will be a Group Leaders' meeting at which you are given the opportunity to air your views and express opinions or concerns.

Remember that Bolton u3a is a member of the North West Region of u3a's, who organise workshops and study days in the area, and details of such events are always advertised in the TAM magazine. Also, a network of Greater Manchester u3a's has been formed which also runs similar events at a more local level. There have also been instances of neighbouring u3a's successfully 'sharing' courses whereby members of both u3a's attend and get involved in the participation - this is to be encouraged as it helps to ensure that the group's attendance figures are maintained at a viable level and the networking encourages the exchange of ideas for meetings.

Group leader should follow the following guidance:

- Whilst pandemic precautions are in place, encourage group members to take a Lateral Flow Test prior to attending the session. A negative test is a requirement for attending.
- Ask to see the venue's risk assessment document and ensure your session adheres to the information therein. This could, for example, during the covid pandemic, ensure that the room is adequately ventilated by opening windows or doors.
- The wearing of face coverings is the lowest of the protection methods of Personal Protection Equipment.
- As group leader it is important to understand the venue's emergency procedures and establish the location of the emergency exits.
- The group leader should also be aware of the venue's alarm signals. Are there different ones for fire, bomb threat, intruders?
- Confirm on which days and time practice fire alarms are sounded and inform group members of these emergency procedures at the start of the meeting.
- Establish where the venue's first aid equipment is located and who is the venue's nominated first aider.
- If problems occur within the venue the group leader should contact, in the first instance, the venue's manager/ representative to resolve

the issue. If this approach is unsuccessful then advise Bolton u3a's venue co-ordinator by email at venuescoordinator@boltonu3a.org.uk

SPECIMEN ATTENDANCE REGISTER

GROUP NAME -

Member	U3a number	1st session	2nd session	3rd session	4th session
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Venue Checklist (Day of Use)

Address of Venue -	
Name of Interest Group -	
Procedure	y / n
1 Emergency Exits unobstructed	
3 Fire Extinguishers in place	
4 Toilet facilities open, clean, paper available etc	
5 Walkways free from trip hazards	
6 Kitchen facilities accessible & clean	
7 Kettle leads in good condition, free from wear and fraying, plug securely attached/PAT test sticker in place?	
8 Refreshment items available	

Notes

Signed

Dated

IncidentReportFormA(involvinginjury/damage)

Notifiername

Group

Contact Details(phone;e-mail)

Where Did The Incident Happen?

Incident Date Time

What Happened?

Injured Person's Name & address

U3A membership number

Age Of Injured Party

Severity of the injury if any

Part The Body Affected,if applicable and any remedial action taken

Action taken by Group Leader

Has“emergency contact”,as per U3A membership card person been notified?

Incident Report FormB (not involving injury / damage)
[perhaps for use in event of a person getting lost/becoming detached from main party]

Notifier name

Group

Contact Details(phone/e-mail)

Where Did The Incident Happen?

Incident Date Time

Circumstances Incident

Name/address of person(s)involved in incident(incl.U3A membership number ,if applicable)

Detailsofanywitnessestoincident ,or who could add information about the occurrence

ImmediateActiontaken

Has Emergency Contact (as per membershipcard) person been notified (ifapplicable)

CURRENT CONTACT LIST

(Committee Members And those who Can assist informing and/or running a Group)

GROUPLEADERS CO-ORDINATOR- Duncan Macpherson

01204 403627(h); 0798 8889399(m);
duncan@dcamacpherson.me.uk; or at
groupleaderscoordinator@boltonu3a.org.uk

ROOM BOOKINGS- Janet Thatcher

01204 846573 (h); venuescoordinator@boltonu3a.org.uk

MEMBERSHIP SECRETARY- Alison Dyson

alison.dyson1676@gmail.com; 01204 842311

TREASURER- David Dean

07599 826874 (m); treasurer@boltonu3a.org.uk

CHAIRMAN- Jeanne Kelly

07740 625080; chairman@boltonu3a.org.uk

BUSINESS SECRETARY- Liz Robinson

07806 791847;
businesssecretary@boltonu3a.org.uk

NEWSLETTER EDITOR & DISTRIBUTOR- David Dean For

Newsletter items - newslettereditor@boltonu3a.org.uk

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Non-committee member

MEETINGS SPEAKER BOOKINGS- Win Conway

01204 398838; winifredconway0@gmail.com