

GROUP LEADERS' HANDBOOK

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CHARD, ILMINSTER & DISTRICT u3a, GROUP LEADERS' HANDBOOK

The success of any u3a depends on its interest groups. The more diverse they are, the more choice for its members. Inevitably there will be a subject or interest which is not catered for and, maybe, this is where you come in to start it up. You can be excused for thinking that this is a daunting prospect, but it need not be. Consider what kind of group you would like to attend - is it for social entertainment, learning a new skill or subject, a discussion group, a sport or physical activity? Whatever it is, you don't have to be an expert or an extrovert. All that's needed is enthusiasm and two or three likeminded u3a members.

The Group Leader

You must first agree the formation of your group with the Groups Co-ordinator / Committee. You will need to find out if there are any others who share your interest - two or three should be sufficient. You don't need nor should you expect to be the 'font of all knowledge'. Questions to ask include:

- Where will you meet? It could be your home or a hall may need to be hired.
- When will you meet and how often? Check with other Group Leaders or the Groups Co-ordinator to pick a time which does not clash with too many other groups.
- What are the aims of the group – what are you hoping to learn/achieve/share?
- Is there an existing national subject adviser who can support with ideas for the development of the group – check on the national website <https://www.u3a.org.uk/> An alternative to subject advisors might be to contact neighbouring u3a's to see if they have a similar subject group and then talk to the group leader to get some first-hand knowledge. It may be that you could sit in on a group meeting.
- Do you have a member who is knowledgeable? Maybe you or one of the group have sufficient knowledge. There is no better way to learn a subject or skill than to teach it
- Will you need any equipment - a computer, CD/DVD player, a projector, a screen? Check with the Group Co-ordinator to see what is available and when.

- What costs are involved? They could be for fuel, venue hire or refreshments and should not fall solely to the Group Leader but shared by the group. [\(See section on Expenses\)](#)

The Role of the Group Leader

The Group Leader is not expected to be an expert or do most of the talking. Primarily their role is to oversee:

- Publicity of the Group – Monthly Meeting, Newsletter, website, Facebook, Beacon
- Co-ordination of Activities
- Leadership of the Programme
- Planning of Sessions
- Chairmanship
- Keeping a Register of members
- Checking that members have paid [their subscription](#).
- Perform a risk assessment for the venue and participants

Be prepared to delegate some of the jobs and responsibilities to other members of the group. For instance, the Group Leader does not need to plan or chair every session. This will make life easier for you, allowing you to concentrate on the aspects that interest you and will make the other members feel that they are contributing.

The First Meeting

If required, the Groups Co-ordinator will sit in on the first meeting.

- Agree the tasks that need doing and by whom.
- Agree, if relevant, the level that the group will be aimed at – beginners, improvers, advanced
 - Agree how the group will work – discussion, instruction, presentation etc
 - Agree when and where the group will run
 - Identify any accessibility needs that group members may have.

Refer to the u3aPlus website for advice and guidance
www.plus.u3a.org.uk

- Agree the personal risk assessment level for group members
- Agree the costs for running the group and what members will pay
 - Introduce yourself and the purpose of the group as you see it
 - Ask about the skills within the group
 - If it is to be funded by your committee agree a budget with them.

- Confirm with your u3a Treasurer how monies will be handled and reported.
- Discuss how group members will communicate with each other bearing in mind data protection concerns. All email contact should be via the encrypted Beacon system and not on members personal computers.
- Agree some ground rules e.g.
 - a) Be punctual
 - b) Listen to each other
 - c) Allow others to speak
 - d) Let someone know if you are unable to attend
 - e) Agree to disagree amicably and be respectful to other group members
 - f) Every contribution matters
 - g) Have patience with and encourage those who are slower to learn

Feedback what was agreed at the first meeting to your Group Co-ordinator to finalise arrangements.

Sources of Help and Support

U3a Websites: Both the national [www.u3a.org.uk] and CID [www.u3asites.org.uk/chardilminster] websites contain a wealth of information. Our own website contains a section on 'Groups' with advice on many things including Beacon familiarisation [see Annex C]

Beacon: The Beacon system is an invaluable tool for managing and communicating with your group members. Training and support is available from the Beacon Administrator.

Educational Sources: National Office offers access to a range of educational resources. These can be booked via the national website if you create an account. For DVD loans, the only cost is return postage.

Sources and Sources Online: Sources is the educational publication and online platform where the work of interest groups is showcased. Sources online can be accessed via the national website or via www.sources.u3a.org.uk

Subject Advisers: Trust volunteers with specialist knowledge in a wide range of topics. Contact details are available on the national website and in Third Age Matters.

External Organisations: Museums, libraries, schools, universities.

u3a Publications: Check the national website for the latest publications.

Networks, Regions and Neighbouring u3a's: allow you to draw on experience from within the movement

Regional Trustee: will provide an overview of the region and a link to National Office

National Office: the staff team are available Monday to Friday to offer support

Research Database: contains up to date information regarding research projects. The database is available under the resources tab of the website.

Policies and Procedures

Your Committee and/or Groups Co-ordinator will advise you of the u3a Insurance arrangements, policies and procedures that you need to be aware of. These will include matters concerning:

- Finance
- Data Protection
- Safeguarding
- Equality, Diversity and Inclusion
- Accessibility
- Complaints
- Incident reporting – a form is provided at annex A
- Risk Assessment – sample forms are provided at annex D

It is recommended that you also have a look at the advice section of the national website where a range of useful information including further risk assessment forms can be found. www.u3a.org.uk It is also a good idea to sign up to the newsletter that is sent out by the Trust on a monthly basis as it will keep you up to date with wider u3a news. You can sign up to the newsletter via the national website.

Expenses

There will always be expenses incurred and these will vary depending on the nature of the group. A discussion group held in a member's home will have virtually none other than, possibly, refreshments. Whereas, an outings group will have transport costs.

In all cases, the group must be self-supporting with the costs shared equally between its members. With high-cost groups there is a greater necessity to collect all contributions from the members in advance, even if an individual is

unable to attend. This will act as encouragement for good attendances enabling your group to continue.

Surplus or Deficit

Although all groups and activities are self-financing, they are not financially independent of the u3a.

All funds belong to the u3a and may be spent as the committee directs; it is common practice to ring-fence surplus funds that have arisen from particular activities so they may be used for a similar activity in the future.

If a group sustains regular deficits, the sum of which exceeds £50, and no increase in membership is likely, then the members of that group should be given the choice of paying increased charges, moving to cheaper accommodation or closing the group. If an activity results in a deficit, the u3a must underwrite it and decide whether the activity should be allowed to continue if further deficits are expected.

Financial assistance can be provided for groups in respect of one-off purchase of necessary capital equipment.

Cash

Where a group leader collects cash from members, then this may be paid into their personal account for immediate online transfer to the u3a's bank account. The bank reference associated with the online transaction must indicate clearly the group name. Group funds must not be accrued in a group leader's personal account. There must be no group bank accounts or cash floats independent from the u3a.

Hall and Venue Hire

Where there is a standing arrangement for hire of premises, the payment for the hire and the money collected to fund the activity should go through the u3a's bank account.

It is recommended that any arrangement for regular hire of premises be signed off by a member of the Committee, as Trustee, as it is a commitment of the u3a's finances.

Invoices from suppliers

Invoices from suppliers for rental and/or other items should be directed to the Treasurer, preferably via email.

Annual Subscriptions

The annual subscription for membership is decided at the AGM in June and is payable at the beginning of the financial year.

All group leaders must ensure that their group members are fully paid-up members including anyone who is attending from other u3a's via Avalon membership.

Proof is ascertained by checking of the member's current membership details on Beacon. It is very helpful if Group Leaders would assist in the collection annual subscriptions – especially from those who do not attend the general meetings. The subscriptions collected should be passed to the Membership Secretary who will issue a receipt and pass the money to the Treasurer.

Membership Records

Details of the group members' name, address, telephone number and e-mail address should be recorded on Beacon. This must be checked and updated at least once a year, not later than 31 May and the Membership Secretary must be notified of any changes in members details. Although the latter should be the responsibility of the member, it cannot always be relied upon.

It is paramount that strict confidentiality is observed regarding organisational and members' personal information and contact details of any member, tutor or Group Leader. Such information must never be disclosed to anyone without permission.

Ensuring that your groups details are kept up to date on Beacon enables the Groups Co-ordinator to see when a group is full and / or has a waiting list. A waiting list must also be maintained by the individual group leaders. The Groups Co-ordinator should be kept up to date with details of the time and venue of Group Meetings and also if there is a change to the Group name, or of Leader, or if the Group has been closed.

The Social Account

The Social Account is a separate bank account used for money associated with activities not involved in the general running of the charity. Money collected for the running of Theatre Trips, Holidays, Coach Hire or Social Occasions must NOT be paid into a group leader's or organiser's personal bank account. Such money must be passed to the Treasurer for payment to

the Social Account. Cheques / Cash to cover such costs will then be issued as and when required.

Newsletter, Website and Facebook

Group Leaders are encouraged to forward information about their group for inclusion in the quarterly Newsletter in order that it reaches all members. Announcements at the monthly meetings will only reach 1/3 of the membership. Further publicity may be obtained by submitting a post to the CID website via the webmaster and the CID Facebook page via the Publicity Materials & Facebook contact on the committee.

Group Leaders' Lunch

Once a year a Group Leaders' lunch is held. This lasts for 2 hours from 12 noon till 2 pm and is an opportunity for the Committee to express their thanks for all the hard work and dedication in the running of the individual groups.

Participation in Discussion

Some people will be more active than others. Some will rarely speak. Depending on the type of group, it is always good to try to steer a middle ground and allow all to participate. All groups can suffer if a particular member becomes dominant, because he/she may try to inflict personal views on everyone and this can lead to ill feeling. Friction can result which may ultimately destroy the group. At the first sign of conflict a stand should be made to prevent it escalating. In the worst case the troublesome member may need to be asked to leave and if this is proving difficult, support can be gained from the Groups Co-ordinator and the Committee. In the event of a serious transgression it would be a good idea to contact the Chairman for advice on the Code of Conduct procedure – details of which can be found on the website.

Non-members

The number of times a NON-MEMBER can attend a meeting is TWICE. After which full membership is compulsory.

The two visits can comprise of:

- 2 visits to a General Meeting
- 1 visit to a General Meeting and 1 to a group meeting
- 2 visits to group meetings which do not have to be the same group

It is incumbent upon the group leader to ensure that a new member is a paid-up member by checking Beacon records.

In the event that membership cannot be confirmed, the person should be denied further participation until the Membership Secretary has been consulted. This may seem a draconian measure, but it is there for two reasons:

1.- INSURANCE - a non-member who has attended more than 2 meetings will nullify the insurance protection provided by the u3a. YOU as a Group Leader will not be protected under their group policy and will be liable in a law suit!

2.- FAIRNESS - Fully paid-up members will be subsidising the non-member, which is very unfair to them.

In Conclusion

It is important for Group Leaders to remember that they are not working on their own and can always turn to the Group Co-ordinator and Committee for advice and help, additional contacts are detailed in annex B. The role of the Group Leader is crucial to the success of the u3a. The task need not be onerous and a lot of support is available. If you feel that there is too much for one person to do, delegate some tasks to other group members. This encourages involvement and lifts the burden.

Good luck with your venture.

[Home](#)

Incident Report Form

Please note that this form is to be filled in by a member of the committee, a group convenor, or the property owner and should be retained on file by the USA committee in case of a claim and for a period of three years even if a claim appears unlikely.

A YOUR DETAILS

U3A	
Name	Position
Email	Telephone
Address	
Postcode	

B INCIDENT DETAILS

Date of incident	Time of incident
Where did the incident occur?	
Please state the reason for the injured person or damaged property being there	
Please describe the circumstances of the incident <i>Attach a sketch or photograph(s) if appropriate</i>	

C PARTICULARS OF PERSON(S) INVOLVED IN THE INCIDENT (continue on a blank page if necessary)

Name	Email
Address	
Postcode	Telephone
Was he/she a member of your U3A on the date of the incident?	
Name	Email
Address	
Postcode	Telephone
Was he/she a member of your U3A on the date of the incident?	

Sections D and E are to be completed for any incident involving injury.

D PARTICULARS OF THE INJURED PERSON(S) (continue on a blank page if necessary)

Name	Email
Address	
Postcode	Telephone
Was he/she a member of your U3A on the date of the incident?	
Name	Email
Address	
Postcode	Telephone
Was he/she a member of your U3A on the date of the incident?	

E DETAILS OF INJURY

Describe the injury/injuries
Immediate action taken
Treatment at the scene
Admission to hospital
Ongoing medical treatment

Section F is to be completed for any incident involving damage to property

I/We declare that to the best of my/our knowledge and belief all the foregoing particulars are true and correct in all respects.

Signed

Dated

F DETAILS OF DAMAGED PROPERTY

Describe damage caused

Estimated cost of repair or replacement

Name of owner of damaged property

Email

Telephone

Address

Postcode

The remaining sections are to be completed for all incidents

G NAME AND CONTACT DETAILS OF ANY WITNESSES TO THE INCIDENT

H DECLARATION

INFORMATION

Telephone Numbers:

For up-to-date names and 'phone numbers of the Committee, see the CID website: www.chardilminsteru3a.org.uk; the Notice Board at the General Meeting, or the Newsletter.

U3A National Office:

Address: 52 Lant Street, London, SE1 1RB Telephone: 020 8466 6139
Opening Hours 9.30am - 5.00pm Web site: www.u3a.org.uk

Education and Resources Manager:

Fran Walton 020 8466 6139

Regional Trustee:

Susan Parker email susan.parker@u3a.org.uk

THE BEACON SYSTEM AND HOW TO USE IT

BEACON is an online management system developed by the National u3a specifically for local u3a's. We use Beacon to manage our Membership Records, Groups & Venues information, the Meetings Calendar and to send emails to members.

There are 2 levels of access to Beacon: -

1. PUBLIC ACCESS

Click [Public Groups](#) to see the public version of the Groups List. Click on any Group in the list for additional information about the group.

Click [Public Calendar](#) to see the public version of the Calendar. For more information about navigating around the Calendar, click [Calendar Help](#).

2. SYSTEM USER ACCESS

Group Leaders and Committee members can click here to log into Beacon as a [System User](#) and update certain information within the site, depending on the access rights associated with their role, as described in the main Beacon User Guide (at the bottom of the Beacon Home page) and in Chard, Ilminster & District's own custom User Guides below.

Chard, Ilminster & District Beacon User Guides

Chapter Index

1. Log in as [a System User](#)
2. [Emails and Letters](#)
3. Login as [a Committee Member](#)
4. Login as [a Group Leader](#)
5. Login as [a Groups Co-ordinator](#)
6. Login as Membership Secretary (under development)
7. Login as [Newsletter Editor](#)

ANNEX D

Venue Checklist (Day of Use)

U3A Name	
Interest Group	
Date	Location/Postcode
Description of Activity	

Check	Yes (✓)
1 Emergency Exits unobstructed	
2 Emergency Exits unlocked	
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	
8 Refreshment items available	
9 First Aid equipment accessible	
10 Safety Briefing given <ul style="list-style-type: none">a. Emergency exitsb. Assembly pointc. What to do if fire discoveredd. What to do if the alarm soundse. Accident / injury reportingf. Toilet and washing facility location	
11 Other (specify)	
12 Other (specify)	

Notes

Exceptional Circumstances

There may be reasons why additional conditions may have to be taken into consideration when completing this risk assessment.

When completing a risk assessment in exceptional circumstances you need to consider how this will impact on the activity, what additional measures or changes you will need to make for each identified hazard in order to reduce risks involved in running the activity. These changes will need to be incorporated into the assessment of how hazards can be reduced or avoided to respond appropriately to the exceptional circumstances you are facing.

Notes for exceptional circumstances:

Signed	Dated
---------------	--------------

Accessed 27/09/17 INSURANCES AND SAFETY

Personal Members' Checklist (Pre-attendance)

During the Coronavirus Pandemic it is important for all U3A members planning to participate in an activity or interest group to consider their own personal health circumstances before taking part. The form below is to provide guidance to you in this consideration.

U3A Personal Members' Activity Checklist – (Pre-attendance) Date of Group Activity: - _____	
1.	All participants to review their own personal health and circumstances and refer to the NHS Website in England , Wales or Scotland for further information if you are at higher risk of getting seriously ill from coronavirus.
2.	Consider the health risk category of anyone else you are living with in your household.
3.	Review the risk check list for the activity you intend to take part in - completed by your U3A group organiser and consider if it is the right decision for you to take part without adverse risk to yourself or household at this time.
4.	Do not take part if you or someone else from your household have covid-19 symptoms – these include a high temperature, a new continuous cough and the loss, or a change to your sense of smell or taste.

Part 2. Personal Checklist Outcomes:		
1.		
2.		
3.		
4.		
<p><i>If you develop symptoms within 48 hours of the activity it is recommended that you apply for a COVID-19 test, and support NHS contact tracing if requested.</i></p>		