



THE UNIVERSITY OF THE THIRD AGE

DONCASTER

Registered Charity No. 1074577

Group Leaders **Handbook**

OCTOBER 2016

CONTENTS

INTRODUCTION	page 3
NEW INFORMATION FOR 2016	page 4
THE GROUP COORDINATOR'S ROLE	pages 5
THE GROUP LEADER'S RESPONSIBILITIES	pages 6,7
HEALTH AND SAFETY MATTERS	page 8
DONCASTER U3A ANNUAL RETURN	pages 9,10

INTRODUCTION

The University of the 3rd Age website(www.u3a.org.uk) provides much useful guidance and information to help Group Leaders with their role and responsibilities.

I have extracted some of their most relevant points for this handbook. The actual documents themselves (which have been updated this year) can be accessed from Doncaster U3A's web site, from the Groups tab.

It is important to remember that you need not shoulder all the work and responsibilities in your work planning for your group sessions and in the admin responsibilities that go with the role. As Wendy reported from the U3A National conference this year; the clear message was that groups should share up workloads between them, so e.g. one can collect subs, one can book the room, another can send out notices etc.... There can also be a sharing of the delivery of the content of sessions.

Some groups have more admin than others, so the number of people involved with this will vary from group to group. It is important that we adhere to the admin responsibilities as we are a charity and need to demonstrate transparency. Some of our admin e.g. checking members of a group have joined our U3A and keeping a register, are to ensure we are not invalidating our insurance. Also like any organisation we need administrative processes to function effectively e.g. in being able to produce accurate and up to date calendars each month.

The Committee wishes to thank you for all the hard work you put in. Without your volunteering spirit our organisation would not exist.

Finally, please contact me if you need any help at all.

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NEW INFORMATION FOR 2016

1. You have previously been informed about the one-month pass card, this has now been formally adopted. Any potential new members who are not sure if they want to join, can apply to the Membership Secretary for a card. This will allow the holder to attend any number of groups within that one-month period. A start date will be written on the card. Therefore, if your group is once a month they shouldn't attend more than once on this basis. The potential member is then expected to join, if they wish to continue attending. It is important that people don't attend your group as a non-member as, as well as it being unfair to other members it invalidates our Public Liability Insurance. Further information on this and the insurance covering our organization can be found in document E04.

2. The organization has adopted a new database known as Beacon. There is a Group Leaders facility on this, where you can keep and update all relevant information relating to your group.

3. We have developed a Problem Resolution Framework. We hope you may never need this but very occasionally Group Leaders experience problems with a member. This may range from a member always arriving late to being disruptive within sessions. Our aim is always to settle problems informally but we felt our organization ought to have a Formal Complaints Policy. Please try and settle problems yourself with the help of a supportive member of your group. If you feel this isn't working, or you don't wish to do this, then please enlist the help of the Group Coordinator. If you feel that a formal complaint is necessary, please ask the Secretary for a copy of the policy.

4. We have included a space on the New Members Form, for the new member to declare any disability. We have a designated member of the Committee who will then contact them to see what their requirements are, who may in turn contact you, to see if you can accommodate them. Please see the U3A guidance documents: F06, F07 and F08 for further information on supporting members with accessibility problems, members with hearing problems and members with vision problems, if you have any such members and would like to support them.

5. Our Web site has been much improved this year. We have very recently added a section for Group Leaders with downloads of all the guidance documents referred to in this handbook. This can be found under the Groups tab.

THE GROUP COORDINATOR'S ROLE

The Group coordinator's main function is to advise and help people who want to set up new interest groups and to monitor and support existing groups. In addition to give members encouragement and ideas to set up new groups.

For new groups: -

- Assist with the timetabling and selection of venue to avoid as much as possible a clash with other groups
- Establish the principle of the group being run by the members for the members and decisions being made by mutual agreement between the members, with tasks allocated to group members and a Group Leader being agreed
- Discuss with the group the various ways to finance the group outgoings
- Ensure the group know about the U3A insurance and that it doesn't cover non-members
- Encourage the group to use the Register pro-forma and keep proper attendance and financial records
- Pass the group details to the Newsletter Editor and the Committee
- Let the group know they can come to the Group Coordinator for help and guidance as needed
- Keep in contact and give encouragement

For existing groups: -

- Offer help and support for any groups that may be in difficulty
- Organise and run meetings for Group Leaders to disseminate ideas and canvas opinion
- Keep records of group details – contact information, members attending, venues used and finance details
- Collect information at least annually and update the records
- Act as a link between the Group Leaders and the committee as needed
- Ensure all groups operate within the constraints of the Charitable status and Constitution of DU3A
- Express the thanks of the committee to the Group Leaders for the work they do

So please enlist the Group Coordinator as an existing Group Leader if:

You are experiencing falling numbers of members

You are unsure of your admin responsibilities

You wish to change the venue or time of your meetings

You are experiencing problems with a member of your group

You wish to pass information or feedback on to Committee members.

You are interested in setting up another Group either at an advanced level to your group or in a total different area.

GROUP LEADERS RESPONSIBILITIES

Although your role as group leader is largely autonomous, we ask that you observe the following points to comply with our organization's procedures. The financial obligations are to comply with the Charity Commission. Please see document F03 for further information.

ADMIN MATTERS

Keep a list of members of your group. Make sure they have a CURRENT MEMBERSHIP number and make a note of it.

Keep a register of attendance and any invited visitors.

Note this is essential to comply with our insurance cover; see document E04 already referred to above.

It would be useful if you could let the Group Coordinator know if your group is full.

Book the venue for your meeting.

Check the details in the calendar distributed in the Newsletter is correct.

Supply information on you group to the Website editor.

Come to the Spring Group Coordinators event.

As about 40% of our members are not on email, we would be grateful if you could pass on notices that are urgent because of the time gap between newsletters.

REMEMBER

You can appoint a deputy to help with these tasks or even better a number of your members. You can enlist the Coordinators help.

FINANCIAL MATTERS

All monies you receive and spend should be verified and never mixed with personal money.

YOU SHOULD

Keep a record of all money received

Get receipts for all money paid out

Only spend money on group objectives

You should not make a profit.

You must complete the Annual return and submit it when requested, (The form is on pages 9-10)

DON'T

Open a bank account

Don't put any money in a private bank account

Don't keep more than £100 in a member's house

Please note that any materials/ equipment purchased by your group belongs to Doncaster U3A and should be labelled as such.

Please note that under our Constitution, the Committee can set its own financial controls and processes and these can change. Any funds that are collected have to be used for our Charitable purposes and a profit shouldn't be made.

OTHER HELP AVAILABLE

If you are running out of ideas for your sessions or feel it is getting a bit stale, then please have a look at the U3A website referred to above. Once registered you will have access to its Resource center.

There are also specialist Subject Advisors who may be able to suggest materials or help in other ways.

If you would like more ideas on how to bring different kinds of study into your group or pointers on running discussion groups, please see document F02 Interest Groups.

DATA PROTECTION, MATTERS

Please observe the basic requirements. Don't pass on member's details onto anyone else. If you want to compile a group email list, ask their permission to do this or use BCC. Using BCC is a much safer alternative and is recommended. Once the member has left, please delete their details. If the Group ceases, delete all details of all members.

HEALTH AND SAFETY MATTERS

The U3A does require anyone in the group to have First Aid Training.

You should call emergency services and follow any advice given. Know the postcode of your venue to facilitate this.

See document F04 on First Aid.

It is advisable to have emergency contact numbers for next of kin from your members.

If there is an accident fill in AN INCIDENT REPORT FORM document E06 and submit it to Doncaster U3A's secretary.

VENUE

Doncaster U3A uses a number of venues at the moment. Some are in the town center, some slightly out of the center, some are free and most are accessible. If you wish to change your venue or start a new group, please discuss this issue with the Group coordinator, there is a form that can be used as a checklist: E08 as a risk assessment. There is also a form that can be used as a checklist when a venue is being used: E09.

If you wish to bring in portable electrical appliances, please check with the manager of the venue and read form E05.

WALKING GROUPS

Walking groups obviously bring with them their own particular Health and Safety issues. It is always important to fully inform members before each walk of issues such as: the distance, terrain, height to be climbed, toilet facilities, equipment, and what food and drink that needs to be taken. It is essential to read document E10 for the full list of requirements. Emergency contact numbers for next of kin should be acquired.

NON WALKING GROUPS

Other groups may occasionally undertake walks as trips. If so, please note the above

DONCASTER U3A GROUP LEADERS ANNUAL RETURN 2016-7

GROUP DETAILS			
Group Name			
Group Leader(s)			
Email Contact name – if different from leader			
Email Address for Group			
Description of Group Activities			
Meeting Venue			
FINANCIAL DETAILS			
Total Income 2015/16		Expenditure 2015/16	
Cost of Venue per Meeting			
Any Other Regular Expenditure			
Any Other Expenditure since April 2015 E.g. purchase of equipment			
Method of Deciding Subs E.g. to cover cost of venue			
Subs Charged per Meeting			
Any Assets held by this Group			
Any other financial information you would like to bring to the attention of the committee			
ANY CONCERNS OR HELP NEEDED?			
MEMBERSHIP DETAILS			
No.	Name	No.	Name

Notes for the Completion of the DU3A Annual Return

The boxes will expand as you type in them. Please take as much space as you need. If you can complete the form and return it to wendy@wendyhattrrell.co.uk before 4 April, please do so. If you prefer to print it out and fill it in, please bring it with you to the Group Leaders meeting on 4 April.

GROUP DETAILS

Please craft the description of your group activities with the Group Activities Booklet in mind. A succinct sentence is preferable to a rambling paragraph.

We have not asked for details of dates and frequency of meetings as we already keep that information. If you change your venue or timings of your meetings during the year it would be helpful to let the Group Co-ordinator know.

FINANCIAL DETAILS

It is important for the Committee/Board of Trustees to have a picture of how the finances for your group work. For most groups this is simply covering the cost of the venue and/or the cost of refreshment. It would be helpful for these groups to submit a simple non-detailed Income Total & Expenditure Total for the year.

For a small number of groups, their financial affairs may be more complicated. Please take as much room as you need to paint a picture of how your finances work. If you handle large sums of money (more than just the venue costs) please let us have a set of income and expenditure accounts.

All charities are required to keep an asset register. Whilst all items purchased by a group can be retained by the group, they technically come under the responsibility of the Trustees. You can think of assets as anything you purchase with group funds which endures - a piece of equipment or a DVD for example. Please list here anything you have not previously listed in your Group Leaders' Annual Return.

CONCERNS OR HELP NEEDED

If you have anything you need help with or are worried about, please give details here.

MEMBERSHIP DETAILS

If you have been keeping a list of members by other means and would like to submit a copy of that instead, please do so. We would also like to see your attendance sheets.

We are asking for membership numbers to be included – you may not have done that on your last return, but we would like you to do so this time. The number we want is the 'old' number on the blue membership cards. We have found that some members are confused about when they should renew their membership and this will help them. It will also remind new members that they need to be a member of DU3A in order to become a member of a group.

