

# Droitwich Spa & District U3A

## Group Leaders' Handbook - Part 1

### Starting an Interest Group

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Interest Groups are the lifeblood of a u3a. Droitwich u3a would be much reduced were it not for the contributions made by our Group Leaders and our u3a wishes to be as supportive to groups and Group Leaders as is practicable. The aim of this handbook, though quite lengthy, is to both help new Group Leaders with their initial organisation, as well as to provide the leaders of more established groups with some detailed information and procedures. In its different parts, this handbook therefore tries to cover the many possible issues and questions that may arise.

This handbook tries to offer advice rather than be authoritarian. However, in some areas where our u3a is affected by legislation, the Executive Committee Members (who are therefore Trustees of our u3a) have a duty to ensure that we operate within the law. In such cases the advice is more prescriptive, as is the case where the Third Age Trust has identified and recommends that u3as should adopt a particular "best practice" approach.

Droitwich u3a is an educational charity, and its purpose is, according to our constitution:

*"The advancement of education and, in particular, the education of older people and those who are retired from full time work by all means, including associated activities conducive to learning and personal development"*

Of course, education and learning could (and for our sort of organisation almost certainly should) be interpreted in their widest form. For example, one common definition learning is :

*"All processes which lead to relatively lasting capacity, whether they be of motor, cognitive, psychodynamic or social character"*

So, our constitution permits us to engage in many different sorts of activities.

## **1. Structure of Interest Groups**

There are as many ways of running an interest group as there are people to run them, and there is no "standard structure" for how groups are organised. The only specific policy of Droitwich u3a is that each group should be, as far as possible, financially self-sufficient. This policy exists in order to keep our membership fee at a reasonable level.

Some groups operate a process of shared learning, where everyone in the group is involved in the learning experience. An example of a Droitwich u3a group of this form is the Art Appreciation group. In this group, members take it in turn to host the group in their home, and at these sessions the host leads a presentation of an artist or an art movement of their own choice. Thus, everyone is involved in teaching as well as learning something new about art. Such an arrangement does not require everyone in the group to be an expert in some area of art - it just requires that everyone in the group is prepared to do some research on some aspect of art that they are interested in, or that they think might be of interest to the other members of the group. In such groups the Group Leader doesn't "lead" the group in a conventional sense, but rather acts as a co-ordinator for the activities of the group - keeping a record of where the group is next to meet and the subject matter of the presentation, and also, they are the contact person for the group.

Other groups involve engaging speakers, possibly from within the group, or maybe from outside of the group, to give a talk on some area related to the purpose of the group. An example of a Droitwich u3a group of this form is the Local History group. In this group, members meet at a hired venue, and the Group Leader arranges the speaker and the topic of their talk for each meeting. In such groups it is usual for the Group Leader to be knowledgeable about the group area - so that they can arrange an appropriate series of talks covering the different areas of the subject that the members might be interested in. But this arrangement is not essential, and the Group Leader could be any member of the group who is prepared to arrange, or even share in the arrangement of the talks, and act as the contact person for the group.

Other groups involve an expert in a particular subject imparting their knowledge or skills to the other group members. An example of a Droitwich u3a group of this form is the Beginners' Bridge group. In such groups it is usual for the subject expert to be the Group Leader so that they can decide on an appropriate frequency of the group meetings, what topics need to be covered at each meeting and to change the planned topics if some revision is necessary. But again, this is not essential, and the group could operate with the expert still deciding what to do at each meeting and the Group Leader as another member of the group who is the contact person for the group.

## **2. How Members Join an Interest Group**

Most members find out about groups by looking at the information on the Droitwich u3a website:

<http://u3asites.org.uk/droitwich/>

The information about each group should include a meaningful name for the group, the days, times, frequency and place where the group meets, any costs associated with meeting attendance, a brief description of how the group operates, and a method for contacting the Group Leader (typically by sending them an email). If a u3a member wants to join a group then they should start by contacting the Group Leader. It is your responsibility as a Group Leader to make sure that this website information is complete and is kept up-to-date, by emailing any changes to the Website Administrator (you should also copy such information to the Groups' Co-ordinator so as to keep them informed about any changes to the group).

Alternatively, u3a members who do not have access to the internet will usually find out about groups from the newsletter, or the notice board at the Monthly Meetings. If they wish to join a group, they will then usually be referred to you by telephone via contact through the Groups' Co-ordinator.

### **3. How to Start an Interest Group**

If you have some special knowledge or interest that you think other members might like to share, then why not start a new group.

You will need to think about the potential target membership, and when and how often the group might meet. A timetable of group meetings is shown on the Droitwich u3a website - so think about a day, time and frequency for the group meetings that will not clash with other groups that are likely to include members of your new group, and who might therefore wish to belong to both groups. The only restriction on timing is that the Committee would ask that no group meet at the same time as the main Monthly Meetings (currently the third Monday afternoon of each month). The Monthly Meetings are open to all members, and all members should be able to attend. Most members prefer group meetings on weekday mornings or afternoons, but there is nothing to stop you having meetings in the evenings or at weekends if necessary.

It also often helps to think about the broad programme that you intend to organise, though the details of this could, and usually should, be determined by the members of the group. Remember, groups do not *belong* to the Group Leader, but to the members of the group as a whole. However, it is useful to establish a broad programme in order to promote the group so that members have some idea of what to expect. If you need to recruit members to a new group, or to expand the membership of an existing group this will usually be done via the website and the newsletter, and having a broad idea of the purpose and objectives will help you write a suitable description of the group for the website, and/or write a suitable advert to appear in the newsletter. In general, try to be democratic, ask for and include members' ideas. For the benefit of all members and of those enquiring about membership, it is essential that you keep the Groups' Co-ordinator up to date on the information about your group.

The Groups' Co-ordinator is available to offer help and advice about all of the above issues - potential membership, timing of meetings, objectives and purpose for the group, and so on, and one of their principle aims is to assist with the creation of new groups.

Sometimes members would like to learn something new about an area but don't have the knowledge or confidence to be able to start a group themselves. The Groups' Co-ordinator keeps lists of members who are interested in the formation of new groups and when there is a sufficient number to start-up the group, the Groups' Co-ordinator will arrange a meeting of these members to see if some way of starting the group can be found. In such cases the Groups' Co-ordinator acts as a facilitator for the creation of the new group, and may sometimes act as the group organiser for one or two meetings so as to get the group started. However, this arrangement must not be permanent, and for the group to continue, someone within the group will need to become the Group Leader.

### **4. Choosing a Venue for an Interest Group**

You will also need to consider the size of the group and an appropriate venue. You only need a handful of members to get started, and with a small number the group can meet in a member's home. Later, if the group expands you can then think about finding a larger venue.

#### a) Using a Private Home

The cost of hiring a venue for a small group can be a deterrent to the group forming, so if your group has not more than about 10 members please try and consider running the group from your home, or that of one of the group members. If a private home is used then it is only right for the group to ensure that the host is reimbursed for any refreshments and other benefits that may be provided. It is suggested that a charge of 50p per person per session is made to cover refreshments, such as a drink of tea or coffee and biscuits.

#### b) Booking a Hired Venue

If the group is too large to meet in a private home, or if you need access to specialist equipment that cannot be used in the home, you will need to consider hiring a venue. Some venues (eg some public houses and cafes) do not make a formal charge for the use of a room but instead ask that all group members buy a drink. Please ensure that your members comply with this request. Other venues make a charge; either by the hour, or by the session (usually a morning, afternoon or evening session). The Groups' Co-ordinator has access to a list of "free" and "paid-for" venues, the amounts that they charge and a contact person for booking the venue. It is the responsibility of someone within the group to book the venue and to ensure that any invoices are paid. Note that some "paid-for" venues offer a discount for charitable organisations such as our Droitwich u3a (our Registered Charity Number is 1180564).

Ensure that your chosen venue can cater for all your requirements in terms of capacity, amenities such as kitchen and car parking. Do you need any special equipment such as a piano, projector and screen? Note that some "paid-for" venues make additional charges for the use of a kitchen or for equipment such as a projector and screen.

#### c) Cancellations and Change of Venue

Should a group meeting need to be cancelled or moved, for whatever reason, please ensure that the venue is informed with as much notice as possible. Also please inform your members. If the alteration is temporary, please do not change the information on the website, but rather contact the members of your group directly - in most cases this will involve keeping them informed by email. However, if the regular venue, day, time or frequency of meetings changes then the Groups' Co-ordinator and Website Administrator must be informed so that information about the group is kept up-to-date.

Many paid-for venues will allow a group to rearrange a cancelled meeting at no extra cost. However, this does depend on the terms of hire for the venue, and the nature of the relationship you have with the venue staff. So, you might also need to consider the cost implications of cancelling a meeting.

### **5. Interest Group Finances**

#### a) Payments for Room Hire

For groups that need to hire a room, you should arrange to pay for the room hire, and collect sufficient attendance money from the group members to cover this cost. Please note that Droitwich u3a has a policy to indemnify a Group Leader against room hire losses that might occur through subsequent lack of attendance, so long as the Group Leader had made reasonable provision to attempt to cover the cost of room hire over the financial year. The Droitwich u3a financial year runs from 1st April to 31 March.

## b) Purchase and/or Use of Equipment

From time to time, a group may decide that it needs some specialist equipment. Consistent with the policy that each group should, as far as possible, be financially self-sufficient, it is normally expected that group members should bear the cost of new equipment. However, the Committee will consider, on its merits, any request to subsidise the purchase of equipment by a group. Such a request is more likely to be looked upon favourably if the equipment is also appropriate for use by other groups, and/or is necessary to facilitate the start-up of a group. Any such equipment should be held by a member of the group, normally for use by the members of that group, but legally is the property of the u3a as a whole, and should be recorded with the Treasurer who keeps an inventory of equipment owned by the u3a for insurance purposes.

## c) What to do with Group Money

You are permitted to hold cash collected from your group members so long as the balance held at any one time does not become significant (maximum to be held being £100). Should the money held exceed this amount it should be passed to the Treasurer, banked, and a cheque issued, or bank transfer arrangement made, when needed. Group member payments in the form of cheques, should be passed to the Treasurer to be banked (cheques should be made payable to "Droitwich Spa U3A"). Bank transfer payments by group members should be arranged with the Treasurer. You are not permitted to use your own bank account, or to open a separate bank account, to hold any payments made by group members. All such monies held by the Treasurer are designated for spending by the group, and will not be spent on general u3a expenses.

A record of all money collected and payments made (including copies of receipts, invoices and confirmation of payments made), whether for room hire, the purchase of equipment, or any other purpose, must be kept and presented to the Treasurer at the end of March each year, for inclusion in the Droitwich u3a accounts. Note that you do not need to account for money paid by members for refreshments provided at a members' home. If these are the only costs associated with your group meetings, then it is not necessary to provide any information to the Treasurer.

Any balance of accounts for a group at the end of the financial year may be rolled-over into the following year so long as there is a reasonable expectation that the monies will be spent. Alternatively, groups may decide to distribute some or all of the balance to the members of the group.

Any money collected by a group, or discounts available to a group, or money returned to the members of a group, etc, should be used fairly for the group as a whole.

## d) Payments for Speakers etc

You should be aware of one of the u3a guiding principles, namely that no salary, fee or financial reward should be paid to any u3a member for teaching other members, counselling them, or helping them in any way. However, if the member providing the service is from another u3a some distance away, you may pay them legitimate travelling expenses. Outside speakers/tutors providing a one-off talk or support session for your group may be paid a fee and/or expenses. However, you should **not** engage the same outside speaker/tutor on a regular basis as a means for running your group, since otherwise the requirements of employment law could fall upon our u3a, or upon you personally.

## **6. Arrangements with Other Local U3As**

Droitwich u3a has a reciprocal arrangement with the u3as in the Cotswold Link, which is a network of u3as in Worcestershire, Herefordshire and Gloucestershire, see:

<https://u3asites.org.uk/cotswold-link/>

and the arrangement also extends to some of our other neighbouring u3as. This means that members of Alcester, Bromsgrove, Evesham, Malvern, Pershore, Redditch, Worcester or Wyre Forest u3as may attend ONE of our interest groups on a regular basis without having to be a Droitwich u3a member. However, if a group has a waiting list, members of Droitwich u3a should have priority. If a member from another u3a attends your group on a reciprocal basis, please check regularly (ie at least once each year) that they have a valid membership card for their u3a. So long as their attendance has been recognised by our u3a, they are also covered by our insurances (in just the same way as if they had been one of our members). Of course, you might think you know what "recognition" means, but the interpretation made an insurance company might be quite different. So, it is best to report such attendees to the Membership Secretary or the Beacon Administrator, who will supply you with a Reciprocal Membership Form. The form requires some contact details – name, email address, postal address, mobile and landline telephone numbers, and the name of their u3a. Please ask the attendee to complete the form and arrange for its return to the Membership Secretary, who will then record them as a Reciprocal Member of Droitwich u3a. The attendee will be given a membership number, but they are not issued with a Membership Card and do not have to pay us a Membership Fee. We do not make any administrative charge associated with such a membership, but they are then formally part of our membership for insurance purposes. If a member of another u3a wishes to attend more than ONE Droitwich u3a group, they must join Droitwich u3a as a full member.

The reciprocal attendance arrangement also implies that members of Droitwich u3a may be able to attend ONE interest group of a neighbouring U3A on a regular basis without having to become a member of that u3a.

## **7. Arrangements with Members of the Public**

Although your group meetings are for u3a members only, members of the public who are potential new members are permitted to attend just once for a taster session. This might be one attendance at a Monthly Meeting, or one attendance on an Educational Visit, or attendance at one meeting of one of our groups. In the latter case the person is expected to contact you beforehand and their attendance at a group meeting is at your discretion.

## **8. Droitwich u3a Equipment**

Droitwich u3a owns a few items of equipment that our groups may use, including:

- laptop computer (with Windows 10),
- projector with connectors for displaying images from a computer,
- lockable steel box (mainly used for storing the projector),
- projector stand
- 2400 x 2400 mm foldable projection screen,
- two flipchart boards with pens and paper,
- folding noticeboard,
- rubber stamp and ink pad (for "Property of Droitwich Spa U3A").

Currently these are held at various locations and the inventory is held by the Treasurer and Chairman, either of whom should be approached for further information.

All electrical equipment owned by the u3a will be checked and PAT tested as required. This u3a equipment is not to be used for non-u3a purposes. Equipment owned by a third party must be safe for use.

## **9. National, Regional and Local u3a Resources**

The Third Age Trust (the national u3a body) has a large number of resources that groups have access to, in order to help in the way that they operate. For further information see the "Learning Resources" section on the Third Age Trust website at:

<http://www.u3a.org.uk/>

These resources include an extensive collection of DVDs & CDs available for all u3a groups to borrow free of charge (except for the cost of return postage), access to a National Advisor for the most popular subject areas who can recommend u3a and other sources of information and is available to offer specific advice, and selected articles from the Sources online magazine providing examples of best practice for Group Leaders and potential leaders of groups. The Third Age Trust has also recently announced a future expansion of these resources, to include Technology Entertainment and Design (TED) talks and access to Massive Open Online Courses (MOOCs).

The Third Age Trust and the Cotswold Link also run occasional workshops on common subject areas, mainly intended for Group Leaders. Droitwich u3a has a policy of supporting our Group Leaders who wish to participate in such workshops. Such support will usually extend to payment of your attendance fee at such a workshop and your travelling expenses, subject to any financial restrictions that might apply. The Droitwich u3a Chairman or Treasurer can provide more advice about this, and can approve such expenditure on behalf of the u3a.

Workshops are also run by the West Midlands u3a Region, see:

<https://u3asites.org.uk/west-midlands/>

but they tend to be concerned with u3a organisation and management rather than the subject areas of groups.

## **10. And Finally**

In many cases, if you need help or if you are in any doubt, it may be easier just to contact the Groups' Co-ordinator, Chairman or Treasurer who will mostly be able to answer your questions and if they cannot, they will find someone who can!

Enjoy your Group Leading! Remember, we only exist through our volunteers!