

Edinburgh U3A



University of the Third Age

Scottish Charity No. SC020301

Guidance for Group Leaders

Website:
www.edinburghu3a.org.uk

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FROM THE CHAIR

This revised Guidance booklet is aimed at prospective as well as new Group Leaders, and is available to all on the U3A website so that they can see what being a leader entails. Many thanks to Joanna Morris and Jane Garrett for editing. It may be read in conjunction with the excellent Third Age Trust publication *More Time to Learn*, which is available in Publications on our website.

Please remember that your Groups Co-ordinator wants to know how your group is going, whatever its age or stage. She/he is a source of information, and will welcome contact and feedback from you. While some of the contact is, by necessity, about the administrative aspects of keeping communication accurate and meeting the needs of our members, it is important that your achievements are shared within Edinburgh U3A. We are always looking for reports and photographs about your activities for the Clarion and the website.

The Committee is always interested in any ideas or suggestions you may have, and your Groups Co-ordinator will raise them at the Committee meeting if you wish. You are welcome to come along to a meeting as an observer. Perhaps you might also send a description of any unusual activity to *Third Age Matters*.

I always enjoy meeting you in person at one of our Group Leaders' lunches. These get-togethers are offered as a small token of appreciation for your role in bringing learning, friendship and fun to your peers and as a way of enabling you to meet and support other Group Leaders.

Meeting together also allows Committee members to pick your brains and lets you provide the Committee with suggestions and ideas for the continuing development of Edinburgh U3A.

Bruce Cowan, Chair, Edinburgh U3A

THE GROUPS CO-ORDINATORS

Groups are allocated alphabetically by title, with each Groups Co-ordinator having responsibility for about 40 groups. Currently there are five Groups Co-ordinators, whose names and contact details are given on page 3 of the Groups Booklet and updated regularly on the website. Because the individuals may change, leaders should regard the names below as valid only for the time of publication. The generic emails below will be redirected to whoever is currently occupying that slot, and should always be used.

A-C	Doreen Barr	gc1@edinburghu3a.org.uk	468 0721
D-I	Ann Keating	gc2@edinburghu3a.org.uk	556 0962
J-P	Joanna Morris	gc3@edinburghu3a.org.uk	339 6461
Q-S	Jane Garrett	gc4@edinburghu3a.org.uk	07584 135049
T-Z	Karyn Costa	gc5@edinburghu3a.org.uk	446 3555

Groups and Group Leaders .. Interest and activity groups are at the heart of the U3A movement. They, like their leaders, come in all shapes and sizes. The best qualifications for organising a group are interest and enthusiasm for the subject, and enjoyment in sharing learning with others. Throughout this booklet, the term Group Leader is used to refer to the member who looks after a group and acts as the organiser. However, how this role is carried out very much depends on the group. Some groups will have two or more people sharing the organisation as joint leaders or co-convenors, organisers, facilitators, etc. It is a good idea to try to share some of the tasks of running a group, both relating to the topic (e.g. members researching a particular aspect of the topic), and to the practical tasks (e.g. booking accommodation, collecting contributions, phoning members without email, etc.).

STARTING A NEW GROUP

The impetus to create a new group can come in a variety of ways:

1) A member decides to start a new group and is willing to lead this group, or at least serve as a focus for communication in collaboration with the appropriate Groups Co-ordinator, to publicise the proposed group in the Bulletin and the website, and by announcements at Open Meetings.

2) A current group develops a sizeable waiting list. The Group Leader may be willing to start a parallel group, or encourage one of the current group members to volunteer to lead a new group. If no leader emerges, the current Group Leader notifies the Groups Co-ordinator who can assist in organising a planning session, at which those on the waiting list, plus any others who indicate interest, will pool their ideas and hopefully produce a leader or leaders. The Groups Co-ordinator can also be helpful in approaching members who she/he may know are knowledgeable or interested in the area to act as leader; and an announcement can be placed in the Group Leaders Wanted section of the Bulletin. It is important that Group Leaders notify the Groups Co-ordinator when waiting lists reach a viable size.

3) Members and Committee identify gaps in existing group offerings. New members are asked about their interests on the application form and in New Members meetings, and Groups Co-ordinators attempt to contact those who suggest ideas for new groups they wish to join or might be willing to lead. In addition, the Groups Co-ordinators always welcome suggestions from current members.

Subject Advisers .. Members may find guidance from the national U3A Subject Advisers, who will offer support and encouragement on the basis of their experience in their own groups. Some provide guidance booklets. See Subject Advice under Resources on the Third Age Trust website: <http://www.u3a.org.uk>. There may also be an issue of the Third Age Trust *Sources* magazine devoted to

your topic. Back numbers are found in the Publications Area of the Third Age Trust website. (Note: as both these sections are in the members area of the website, you will have to register first.) In addition, the list of Subject Advisers is given in each printed issue of *Third Age Matters*, mailed to all U3A members.

Accommodation .. Many groups meet in the Group Leader's or another member's home, but this may not be practical. A list of Potential Meeting Venues is available on our website under Groups. These include rooms in public libraries (contact your local library for information on room hire), church halls (these charge a fee), cafes and pubs, sports facilities and outdoor locations (for activity groups). Napier University has recently made venues available without charge at its various locations. If you need to hire a venue, consider the cost, access arrangements, the group's size, and its needs (e.g. chairs, tables, equipment, including induction loops for people with hearing impairment, room for physical activities; buses, parking, toilets and refreshment facilities). When negotiating charges with venues, always mention that Edinburgh U3A is an educational charity, and members are (mainly!) older people and may qualify for a discount.

Charges .. If a group meets in the Leader's home, a minimum of £1 per member is usually paid to cover refreshments. Where there are charges for accommodation, materials, photocopying or other items, the charge needs to be built into the cost of the group and passed on to group members. This can be paid at every meeting or in the form of a small annual donation.

Group Proposal Form .. Once you have decided on the individual aspects of the group, you will be ready to complete a New Group Proposal Form. This can be obtained from your Groups Co-ordinator, or from the website at <http://u3asites.org.uk/edinburgh/page/55304>. This can be done before all the details of venue, time, day etc are known. The form will later be updated when complete information is available.

Please send the form to the Groups Co-ordinator who will put it on the agenda for the next Committee meeting, and also circulate it electronically to the Committee. Once approval has been granted, and the first group meeting planned, the details will be listed on the website and in the Bulletin, and in the monthly online update of the Groups Booklet.

Request for Start-Up Grant -- Equipment, Accommodation, and Tuition .. While the group should aim to be self-financing, it is recognised that you may have to purchase equipment or a specialist book for your group. Any items purchased in this way become the property of Edinburgh U3A and must be returned if they are no longer being used. The guideline for a start-up grant is around £50. In addition, several U3A laptops and projectors are available to borrow on an occasional basis. A portable sound system is also available. Contact the Technical Support Officer at techsupport@edinburghu3a.org.uk.

In exceptional cases, a start-up grant can be made for accommodation costs to support the first few meetings of the group while numbers are being finalised. Finally, a scholarship has recently been established to provide tuition funding for Group Leaders who want to acquire knowledge in their subject area which they can then share with their group members. Forms and instructions are available on the website.

Distance Learning .. Some groups may wish to consider using a free online course as input. There are now thousands of these MOOCS (Massive Online Open Courses), usually produced by Universities. The most useful umbrella providers are Future Learn (<https://www.futurelearn.com/>) and Coursera (<https://www.coursera.org>). Although most advertise that courses last for a certain time, the material is kept available online for several months after the course has officially ended, enabling groups to use it at their own pace. The External Communications Officer on the Committee has also persuaded Edinburgh

University to make much of the material from their courses directly available.

Shared Learning Project .. A Shared Learning Project allows U3A members to work in partnership with an institution such as a museum, gallery, university, library, archive or stately home. A group of members would offer time, energy and expertise in return for the opportunity to engage in research or some other enterprise to the benefit of all involved. The Third Age Trust website has more information on this topic.

ONGOING GROUPS

Dealing with Demand .. It is often difficult for new members to find groups with available spaces, so Group Leaders need to be sympathetic and helpful with enquiries. If your group is full, you should tell the enquirer that their name will go on a waiting list, and give them an idea of how long it might be for their name to reach the top of the list. If your group has vacancies you need to have that listed in the monthly Bulletin (bulletin@edinburghu3a.org.uk). A potential new group member is allowed to attend a group meeting before making a definite commitment.

Communication with Group Members .. When emailing your group members, it is important in terms of data protection that you only share the email addresses of those members who have agreed that you may do so. We recommend that you use the forms in the General Data Protection Regulations (GDPR) section of the website which have been prepared in accordance with the document 'Edinburgh U3A Privacy Policy for Group Leaders'. Go to the 'Group Leader and Committee Forms' link on the Resources Page. If you store members' details on your computer, in theory you should encrypt these.

If you do not have permission to share a member's email address you should always use the blind copy arrangement (BCC) for

them. There are still many members who do not have email. Arrange for them to be kept in touch by telephone. You should be willing to print a copy of the monthly Bulletin for these members, or show them the Bulletin on a screen, at the group meeting. Communicating the group programme weeks or months in advance is always helpful. Some groups post programmes on the website: contact the manager at webmaster@edinburghu3a.org.uk.

Study Trips .. Your group might want to arrange a study trip with one or more overnight stays. Please have a look at the guidance on our website -- under Resources -- and let your Groups Co-ordinator know your plans, as the Committee considers each plan to ensure that the correct procedures are followed.

Group Deputy .. Please appoint a deputy so that there is someone who can decide what to do and contact the other members of the group if anything unplanned were to happen to you. Please give your deputy the members' list with up-to-date contact details, and keep your deputy's contact details with you when you travel to facilitate communication in emergencies. Your Groups Co-ordinator will ask you for your deputy's name and contact details in October, so that she/he can contact the deputy to facilitate communication with members if you are not available for any reason.

Attendance .. Please keep a register of attendance at each meeting. A form is available on our website. It is important, if you have a waiting list, not to allow long-term non-attenders or very infrequent attenders to hold on to places which those on the waiting list would like to have. It is important, however, always to warn members if their place is about to be given to someone else. When vacancies arise, invite those on the waiting list to join the group in order of application.

Checking Membership Cards .. Please ensure, at the first group meeting in the Autumn, that you see a new Edinburgh U3A

membership card which shows that the member has renewed their subscription.

Succession Planning .. If you are thinking of giving up the role of Group Leader and you cannot identify someone in the group, or in your networks, to succeed you, or you are having difficulty recruiting new members, please give your Groups Co-ordinator early warning about these issues.

Forms .. Most of the forms which may be useful to Group Leaders are on the website, where they can be downloaded: <http://u3asites.org.uk/edinburgh/page/55304>. They include the Group Proposal Form, Disclaimer, Income and Expenditure Statement, Accident or Incident Report, List of Members and Attendance, and General Data Protection Regulations (GDPR) material. If you need printed or emailed copies, please ask your Groups Co-ordinator.

ROLE OF THE GROUPS CO-ORDINATORS

Supporting Group Leaders .. Groups Co-ordinators are the link between Group Leaders and the Committee, and should reflect your views to the Committee as well as providing news or information relevant to your particular group.

Knotty Issues and Safeguarding .. Occasionally, you may find it helpful to discuss with your Groups Co-ordinator any interpersonal issues within your group. You should definitely let your Groups Co-ordinator know if any group member complains about you. If you are considering asking a member to leave the group for any reason other than non-attendance, you must first discuss the procedure with your Groups Co-ordinator and with the Safeguarding Officer.

Safeguarding is a term used to describe how we protect adults from abuse and neglect. It is an important shared priority of many public services. Safeguarding is about protecting certain people

who may be in vulnerable circumstances. The Office of the Public Guardian (OPG) identifies the following groups who have been shown to be at increased risk of physical or mental abuse or neglect -- including self-neglect:

Females over 75

Those with an organic brain injury

Those with cognitive impairment, including memory disorders

Those with physical or emotional dysfunction including depression, losing a partner and living alone.

Safeguarding is everybody's business, and in line with this, the Edinburgh U3A has adopted a Safeguarding policy (see our website under Resources tab) and takes responsibility for the well-being of its members.

Group Leaders in particular, who have direct contact with U3A members, may find they have concerns about a particular member's well-being or safety. These concerns can be discussed initially with the Edinburgh U3A's Safeguarding officer (safeguarding@edinburghu3a.org.uk or phone number on your membership card). The U3A can then put steps in place to ensure that correct advice is obtained to help prevent abuse or neglect.

Administration .. Groups Co-ordinators collate the material for the Groups Booklet and ensure that information about groups is circulated within the system (Loop at the Open Meeting, online Groups Booklet, website, Bulletin, etc.) Please support them in this task by replying promptly to requests for information and letting them know of any changes to the group or your own details. In May/June, you will be thinking about the next session. In discussion with your group, please decide whether there will be changes in the format of your group. Check your current entry in the Groups Booklet, and prepare amended or new versions as required. Be ready to send the information to your Groups Co-ordinator when it is requested, or tell your Groups Co-ordinator if no change is required.

PUBLICITY FOR GROUPS

The Bulletin and the Loop .. The Bulletin includes group updates, group vacancies, new and proposed groups, etc. It is emailed monthly to all members with email. The Loop is a display of group and other notices projected onto a screen at each monthly Open Meeting. You can put a notice in the Bulletin which will also be included in the Loop by emailing bulletin@edinburghu3a.org.uk, to arrive at least 5 days before the date of the Open Meeting. Try to keep your text as brief as possible, and copy your email to the Groups Co-ordinator. Alternatively, you can send the message to the Groups Co-ordinator who will relay it to the Bulletin editor.

The Website .. It is increasingly important to be familiar with the website, and we try to make it as navigable, and as up-to-date, as possible. The Groups page has an alphabetical list of all groups, and then a listing by day of the week. The website Groups Booklet and Groups pages are updated every month. If you see any errors, please let us know: webmaster@edinburghu3a.org.uk. Also email the webmaster if you want a page for your group with programme or other information.

The Groups Booklet .. This is posted at the end of August to all members and gives the latest groups information. It becomes out of date almost immediately, so must be supplemented with information from the website.

The Clarion and Clarion Online .. Our magazine, *The Clarion*, is usually published twice a year. There is a colour online version on our website for people who have access to the Internet. Other members receive a black and white version in the post. Articles about group activities are always welcome, with colour photographs. Get someone in your group to write an article from time to time. Contact the editor at clarion@edinburghu3a.org.uk.

MONEY MATTERS

Groups are for Paid-Up Members .. Group Leaders have a key role in ensuring that only paid-up members of Edinburgh U3A participate in groups by asking that members show them their Membership Cards on joining, and at the beginning of each year after renewal. As well as being fair to all, our insurances can be invalidated if not all group participants are paid-up members of Edinburgh U3A. For this reason, if a non-member is considering joining, attendance should be strictly limited to one visit to the group. Members of other U3As are welcome to visit an Edinburgh group if there is space, once or twice, but they should then join the Edinburgh U3A if they wish to continue to attend a group.

Group Finances .. Groups should be self-financing, with members meeting a share of any costs of room hire, materials, refreshments etc. The U3A principle is that no payment should be made to a speaker or a tutor in group activities -- give flowers or wine instead. Payments should not be made to U3A members for anything other than expenses, for which receipts should be submitted. Payments should not be made to another charity from group funds unless in return for a service such as accommodation.

Payment of Expenses .. Reasonable travel expenses can be paid to speakers at groups where we are not making a payment. Where speakers use public transport, they can provide a receipt/ticket. If speakers use their car, we can reimburse petrol costs. Any costs paid in this way are met from group funds.

Payment for Travel to Group Members .. Ideally, all travel should be made by bus, which is usually free to our age group. Where members are travelling on U3A business, e.g. members of the Visits Committee undertaking a recce for a visit, and it is more practical to use a car, a donation towards mileage may be claimed. Also, if one or more cars are used for outings with varying numbers of passengers (e.g. walking groups), a voluntary donation

can be made by each member towards transport costs. Total donations per car should not exceed the HMRC mileage allowance.

Group Funds .. Groups which have accommodation and other significant costs, and which charge more than the basic £1 for meeting in someone's home and a little for photocopying and minor materials, should maintain basic records of all income and expenditure and submit them to the Treasurer at the end of the year on the form available on the website, or other format, if wished. It is not good practice to have significant cash in the home and there are risks to other members where funds are banked in a member's bank account in their own name. As a guide, groups should not hold more than £200 in cash.

Some groups are required to sign an agreement for the hire of a hall or other venue and may be required to pay by direct debit. You must contact the Treasurer if you are considering such an arrangement, as a member of the EU3A Committee must sign the agreement. A member of the group (Group Treasurer) should collect the required payment from members of the group, and either pay it in directly to the EU3A account, or pass the money/cheques to the Treasurer.

Where a group has more than £200 in funds, the Treasurer should be contacted to arrange payment of the excess into the general fund account to be accessed when required. Group funds are held as restricted funds for the group's use so they will not be used for anything else. Under NO circumstances should a group open and operate its own bank account or deposit funds in a member's own bank account.

Members who pay by cheque for groups, study tours or holidays should always make the payment to the Edinburgh U3A, NOT to the organiser. Groups, which pay funds into the general fund account on a regular basis, may have their own pay-in book.

When groups have paid funds into the general account the Treasurer will arrange for relevant payments to be made as requested by group leaders. Groups must have sufficient funds to cover any payments that the Treasurer is requested to pay.

INSURANCE

Third Age Trust purchases insurance which covers all affiliated U3As. The full description of the cover is provided on our website and should be read in conjunction with this very short section. There is also a helpful question and answer section: <https://u3asites.org.uk/edinburgh/page/55301>. There are a number of different insurance policies:

Public and Products Liability which indemnifies all U3A members against all sums we could become legally liable to pay as a result of accidental injury to or death of any person or accidental loss or damage to material property not belonging to you, which arises or is caused in connection with the 'business' of U3As. Cover is also provided for small amounts of U3A cash held in members' homes, hired premises and in transit.

All Risks Equipment Insurance provides cover for loss or damage to property owned by a U3A, excluding wear and tear, depreciation, and gradual deterioration, wherever it is held and in transit, providing due diligence is observed and reasonable precautions are taken to ensure it is stored and transported securely.

Home Contents Cover This covers damage to the property of any U3A member whilst their home is being used to host a U3A interest group/meeting.

Charity Indemnity Insurance provides indemnity for the legal liability of a trustee or the charity for loss, which results from a wrongful act when carrying out the duties of a trustee.

Tour Operators' Liability covers a Group Leader/Co-ordinator who arranges a short study trip for his/her group, involving overnight accommodation. It does not cover U3A holidays, which should be organised through a bonded travel agent/tour operator. If groups are planning to be away for overnight stays, they must contact their Groups Co-ordinator, as the Committee will want to ensure that the correct procedures are followed.

Personal Accident. Note that there is NO insurance cover for personal accident, unless the U3A can be found to be negligent. Members should be advised to take out personal accident cover if they wish to be covered. Members attending holidays and study group visits are expected to arrange personal accident insurance.

LICENCES

Photocopying .. Edinburgh U3A purchases a licence to photocopy books and magazines in copyright. This is within clearly defined limits -- extracts to 5%, one chapter or one article, whichever is the greater. Sheet music within copyright must not be copied. Free sheet music can be obtained online at www.cpd.org/ There is a licence to copy entire works for visually impaired members.

DVDs and Videos .. Interest groups can use DVDs or videos for educational purposes.

Films .. The Third Age Trust has arranged a licence to show films distributed by the Motion Pictures Licensing Corporation and Filmbank Media. Edinburgh U3A pays our contribution each year.

Recorded Music .. The Third Age Trust has arranged a PPL licence which enables us to play recorded music in public as part of an interest or activity group.

Performance .. The possession of a Performance Rights Licence is the responsibility of any venue where a public performance is

made. If you are arranging a performance this should always be checked with the venue operator.

Transport .. The Department of Transport requires any driver with a licence to drive a minibus with space for up to 16 passengers to have a permit. Please contact the Chair if you wish to make use of Edinburgh U3A's permit. The driver and all passengers must be members of the U3A.

SAFETY OF MEMBERS

Law does not require formal written risk assessments. However, the Third Age Trust has provided some common-sense checklists which we have adapted for our use. There are checklists for different types of venue, including the home, and for active groups such as Walking, Cycling, etc. They are available on the website.

Members are ultimately responsible for their own safety, and we ask them to confirm that they are fit enough to attend active groups. Relevant Group Leaders should get all participants to sign the Disclaimer form (on the website) when they join. In the event of an accident, Group Leaders are requested to let their Groups Co-ordinator know and complete an Accident or Incident report for the Groups Co-ordinator to share with the Committee.

Given the age and health status of some of us, it is prudent for Group Leaders to indicate to members that it is wise for ALL members (not just those belonging to activity-based groups) to carry the yellow *In Case of Emergency (ICE)* card at all times, to ensure that the correct people can be contacted. First responders also know to look for them. All members are sent one when they join, and again each year, along with their renewal material.

U3A MATTERS

The Edinburgh U3A Committee meets 10 times a year. Our names are on your Membership Card. We welcome contact,

feedback and suggestions. Edinburgh U3A is a registered charity. Committee members are Trustees of this charity and accountable to the Office of the Scottish Charity Regulator. Edinburgh U3A made commitments when we affiliated to the Third Age Trust and our activities should comply with this agreement, U3A principles and our constitution. The constitution is on the website.

THIRD AGE TRUST

Although we are a self-governing body, we have been affiliated to the Third Age Trust for more than 25 years. The Trust, based in Lant Street, London (www.u3a.org.uk), is the national representative body of more than 1,000 U3As in the UK, and underpins the work of local U3As by providing guidance and administrative support to individual management committees and arranging significant provisions such as insurance. Through the Third Age Trust, all U3A members have access to a free 24-hour Legal Help Line. The provider changes from time to time, so check details on the website.

U3A IN SCOTLAND AND WORLDWIDE

Edinburgh U3A is one of more than 50 U3As in Scotland which together make up the Scottish Region. This group arranges national assemblies for networking, study days or residential schools, and an annual Conference and AGM to which all Scottish U3As are invited (<http://u3asites.org.uk/scotland/home>). These events are normally notified to Edinburgh members through the Bulletin. Finally, you may be interested in finding out more about our international links to overseas U3As. You could start by signing up for the monthly email newsletter *Signposts* at <http://www.worldu3a.org/>.

