

Edinburgh u3a

Guidance for Group Leaders

Edinburgh u3a has more than 200 special interest groups, and we need more to meet the interests of new members! If you have knowledge or experience of a specific topic, or perhaps just interest in an area of the arts, science, literature, sport, or life, please consider starting a new Eu3a group.

Starting a new group is a simple procedure. Fill in the one-page application for committee approval of a new group <https://u3asites.org.uk/edinburgh/page/55304>, and get some help and advice by speaking to a Group Coordinator, or an existing Group Leader (contact details can be found on the website).

The next few pages contain essential information needed by a new Group Leader. And please also see "Starting a New Group" on the Eu3a website: <https://u3asites.org.uk/edinburgh/page/55294>.

Your Group Coordinator can provide help and advice, will be very happy to know how your group is going, whatever stage it is at, and will welcome feedback from you. While some of the contact will be about the administrative aspects to meet the needs of members, it is important to us that your achievements are shared within Eu3a. We are always looking for reports and photographs about your activities for the Clarion and the website. Eu3a Committee members are very interested in any ideas or suggestions you may have, and your Group Coordinator can raise them for you at a monthly committee meeting.

Groups are allocated alphabetically by title to a Group Coordinator with each having responsibility for about 40 groups. All Group Coordinators are Eu3a committee members. There are usually five Coordinators (GC1-5):

A-C gc1@edinburghu3a.org.uk

D-I gc2@edinburghu3a.org.uk

J-P gc3@edinburghu3a.org.uk

Q-S gc4@edinburghu3a.org.uk

T-Z gc5@edinburghu3a.org.uk

At the moment we have only three GCs: Louise Grimm (GC5), Susan Miles (GC4), and Keith Guy (GC2) who together cover the five sets of groups. To contact a Group Coordinator please always use the generic email which will be directed to whoever is currently occupying that position. Enquiries about groups in GC1 and GC3 will be directed to one of the other GCs for the time being. As a Group Leader, if you encounter any difficulties or need any advice, please don't hesitate to contact a Group Coordinator.

Groups and Group Leaders. How the role of Group Leader is carried out will very much depend on you and the members of your group. Some groups may have several people sharing the organisation. 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 who may not use email) can be shared among group members.

Accommodation. A list of Potential Meeting Venues is available on the website <https://u3asites.org.uk/files/e/edinburgh/docs/eu3avenuesver9.pdf>. These include rooms in public libraries (contact your local library for information on room hire), church halls (these may charge a fee), cafes and pubs, sports facilities and outdoor locations (for activity groups). Many groups meet in the Group Leader's or another member's home.

If you need to hire a venue, please 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, refreshment facilities).

Charges. If a group meets in the Leader's home, £1 per member is usually paid to cover refreshments. When there are charges for e.g., accommodation, materials, photocopying, these need to be built into the cost of the group and passed on to group members.

Start-Up Grant: Equipment, Accommodation, and Tuition. While the group should aim to be self-financing, you may have to buy equipment or a specialist book for your group. A start-up grant of £50 is readily available, and your Group Coordinator can submit a request for this to the Eu3a Treasurer for you.

Several laptops and projectors are available to borrow on a short-term 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.

Distance Learning. You may find free online courses useful. There are now thousands of MOOCS (Massive Online Open Courses), produced by Universities and Colleges. Useful providers are Future Learn (<https://www.futurelearn.com/>) and Coursera (<https://www.coursera.org>). Most courses are short duration, and the material is usually available on a long-term basis, enabling groups to use it at their own pace.

Subject Advisors. National u3a Subject Advisors from the Third Age Trust will give support and encouragement on the basis of experience in their own groups: <https://www.u3a.org.uk/learning/subjects>. A list of Subject Advisors is also in each printed issue of Third Age Matters, mailed to all u3a members.

Shared Learning Project. A Shared Learning Project allows u3a members to work in partnership with an institution such as a museum, gallery, university, library, or archive. A group of members would offer time and expertise in return for the opportunity to engage in research or some other enterprise to the benefit of all involved. See the Third Age Trust website <https://www.u3a.org.uk/> for more information

Dealing with Demand in Groups. It is sometimes difficult for new members to find groups with available spaces. If your group is full, you should tell the enquirer that their name will go on a waiting list, and you should give them an idea of how long it might be before a place is available. If a group has vacancies this should be listed in the monthly Bulletin in response to the regular requests for information from the Bulletin Editor: <https://u3asites.org.uk/edinburgh/page/80755>.

Communication with Group Members. When emailing your group members, you should only share the email addresses of those members who have agreed that you may do so. Please 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': <https://u3asites.org.uk/files/e/edinburgh/docs/gdprpolicyforgls.pdf>). If you store members' details on your computer follow the guidelines on the 'Group Leader and Committee Forms' link: <https://u3asites.org.uk/edinburgh/page/55301>.

If you do not have permission to share a member's email address you should always use the blind copy address (BCC) for them. Please remember that not all members are on-line and you may need to keep in touch by phone.

Group Deputy. Please appoint a deputy and give them 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.

Attendance. Please keep a register of attendance at each meeting. A form for this is on the website: <https://u3asites.org.uk/edinburgh/page/55304>. If you have a waiting list, please don't allow long-term non-attenders, or very infrequent attenders, to hold on to places which those on the waiting list would like to have. Always alert 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.

Paperwork. Forms which may be useful to Group Leaders are on the website, see: <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.

Publicity: The Bulletin and the Loop. The Bulletin includes group updates, group vacancies, and new and proposed groups. It is delivered monthly to all members. The Loop is a display of group and other notices on screen at each monthly Open Meeting. You can post 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. Please keep your text as brief as possible.

The Website. The website is a valuable source of information: <https://u3asites.org.uk/edinburgh/home>. 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 here: webadmin@edinburghu3a.org.uk. Also email webadmin if you want a page for your group with programme or other information.

The Clarion and Clarion Online. The Clarion is usually published twice a year. There is an online version on the Eu3a website, and members without internet access can request a copy of the Clarion by post. Articles about group activities are always welcome. Contact clarion@edinburghu3a.org.uk.

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. Payments should not be made to Eu3a members for anything other than expenses, for which receipts need to be submitted. Payments should not be made to another charity from group funds unless in return for a service such as accommodation.

Please contact the Treasurer with any financial queries or for expenses claims: treasurer@edinburghu3a.org.uk

Payment of Expenses. Reasonable travel expenses can be paid for speakers at groups. Where speakers use public transport, they should provide a receipt/ticket. If speakers use their car, petrol costs can be reimbursed. Any costs paid in this way should be from group funds.

Group Funds. Groups which have accommodation and other significant costs, should maintain basic records of all income and expenditure and submit them to the Treasurer at the end of the year. As a guide, groups should not hold more than £200.

Some groups may be 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 is required to sign the agreement.

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; this can be accessed as required. Group funds are held as restricted funds for the group's use so they will not be used for anything else. A group must not operate its own bank account or deposit funds in a member's own bank account.

Members who pay by cheque for group activities should always make the payment to "Edinburgh u3a", and not to the organiser. Groups which pay funds into the General Fund Account on a regular basis will have their own pay-in book. When groups have paid funds into the General Fund Account the Treasurer will arrange for relevant payments to be made as requested by a Group Leader.

Third Age Trust. The u3a national body – the Third Age Trust <https://www.u3a.org.uk/> provides educational and administrative support for all the u3as in the UK. Founded in 1982 there are more than 1000 local u3a groups across the UK. The Trust is based in Lant Street, London and supports the work of local u3as by providing guidance and administrative support to individual management committees and by arranging significant provisions such as insurance. Through the Third Age Trust, all u3a members have access to a free 24-hour Legal Help Line.

Insurance. The Third Age Trust provides the insurance which covers all affiliated u3a groups. The full description of the cover is provided on the Eu3a website. There are a number of different insurance policies:

Public and Products Liability. 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. Also covered is accidental loss or damage to material property not belonging to you, which arises in connection with the activities of Eu3a. 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 member, 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 handled appropriately.

Home Contents Cover. Covers damage to the property of any u3a member when their home is being used to host a u3a activity.

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. This covers a Group Leader who arranges a short study trip for their group, perhaps involving overnight accommodation. It does not cover longer periods, which should be organised through a bonded travel agent or tour operator. If groups are planning to be away for overnight stays, they must contact their Group Co-ordinator, as the Committee have a responsibility to approve the travel arrangements. There is no insurance cover for personal accident, unless Eu3a is found to be negligent. Members should consider personal accident insurance.

Photocopying. Eu3a has a licence to photocopy books and magazines in copyright. This is within clearly defined limits of extracts to 5%, one chapter or one article, whichever is the greater. Sheet music within copyright must not be copied. There is a licence to copy entire works for visually impaired members.

Media Sources. DVDs and Videos: Interest groups can use DVDs or videos for educational purposes. Films: The Third Age Trust has a licence to show films distributed by the Motion Pictures Licensing Corporation and Filmbank Media.

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

Performance: 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.

Safety of Members. There is no legal requirement for formal written risk assessments of Eu3a activities. The Third Age Trust has provided some common-sense checklists which have been adapted for Eu3a use. There are checklists on the website for different types of venue, including the home, and for outdoor activity groups.

Members are ultimately responsible for their own safety, and we ask them to confirm that they are fit enough to attend active groups. Group Leaders should encourage members to sign the Disclaimer form: <https://u3asites.org.uk/edinburgh/page/55304> when they join a group.

In the event of an accident, Group Leaders are requested to let their Group Coordinator know and complete an "Accident or Incident" report <https://u3asites.org.uk/edinburgh/page/55304>.

Difficult Issues and Safeguarding. Occasionally, you may find it helpful to discuss any difficult issues within your group. You should definitely talk to your Group Coordinator if any group member has a complaint of any sort, and you might consider contacting the Safeguarding Officer (safeguarding@edinburghu3a.org.uk). This is especially important in the unlikely event of you having any inter-personal difficulties with a member of your group.

Eu3a has adopted a Safeguarding Policy:

(<https://u3asites.org.uk/files/e/edinburgh/docs/safeguardingpolicyforweboct18.pdf>)

and takes responsibility for the wellbeing of its members.

If there are any concerns about a particular member's well-being or safety this can be discussed for advice with the Safeguarding Officer.

Business Meetings. The Eu3a Committee meets 10 times a year. Committee members names are on the website: <https://u3asites.org.uk/edinburgh/contact>.

Eu3a is a registered charity. Committee members are Trustees of this charity and accountable to the Office of the Scottish Charity Regulator.

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