Edinburgh u3a

**Guidance for Group Leaders**

Edinburgh u3a has about 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 doing, whatever stage it is at, and will welcome feedback from you. While some of the contact will be about 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. All Group Coordinators are Eu3a committee members. There are usually five coordinators (GC1-GC5):

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

Contact for your group:

To contact your Group Coordinator please always use the generic email above which will be directed to whoever is currently occupying that position.

**Groups and Group Leaders.** How the role of Group Leader is carried out will very much depend on you and the members of the 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.

**Groups are for Paid-Up Members.** Group Leaders should ensure that only paid-up members of Edinburgh u3a participate in groups by asking new members for their Membership Numbers on joining and asking all members for their Membership Numbers annually thereafter. As well as being fair to all, insurance policies 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 taster session.

**Group Deputy.**Please appoint a deputy to be the point of contact with the group in case you cannot be contacted, for whatever reason, and supply the deputy’s contact details to your Group Coordinator.

Group Coordinators will maintain a record of Group Deputies’ Contact Details. but these will not be publicised.

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

Several laptops and projectors and a screen 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.

**Accommodation.** A list of Potential Meeting Venues is available on the website <https://u3asites.org.uk/files/e/edinburgh/docs/u3avenuesforgroups.pdf>

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). Many groups meet in the Group Leader's or another member's home.

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, refreshment facilities).

**Charges.** If a group meets in the Leader's home, a minimum of £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.

Outdoor activity groups will use public transport but, occasionally, car-sharing will be required. In this case, passengers should make a contribution to be determined by the Group Leader.

**Attendance.**Please keep a record of attendance at each meeting.  A form is available 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.

**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'. 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 online and you may need to keep in touch by phone.

**Dealing with Demand in Groups.**It is often 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. At any time, vacancies can also be highlighted in the Groups pages on the website.

**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.  Relevant Group Leaders should insist that, as a condition of membership of the group, all participants sign the Disclaimer form. <https://u3asites.org.uk/edinburgh/page/55304>

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>

for the Group Coordinator to share with the Committee.

**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. This is especially important in the unlikely event of you having any inter-personal difficulties with a member of your group.

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 suffer in vulnerable circumstances.

Safeguarding is everybody's business, and in line with this, Edinburgh u3a has adopted a Safeguarding Policy (see the website under Resources) and takes responsibility for the wellbeing of members.

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

**Resources for Group Leaders:**

**Distance Learning***.* You may find free online courses useful.  There are now thousands of MOOCS (Massive Open Online Courses), produced by Universities and Colleges. Useful providers are Future Learn (<https://www.futurelearn.com/>) and Coursera ([https://www.coursera.org](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 Advisers, will give support and encouragement on the basis of their experience in their own groups: <https://www.u3a.org.uk/learning/subjects>. A list of Subject Advisers is also in each issue of Third Age Matters.

**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 at <https://www.u3a.org.uk/> for more information.

**Photocopying*.*** Edinburgh u3a 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.

**Paperwork.**Forms which may be useful to Group Leaders are on the website, see: <http://u3asites.org.uk/edinburgh/page/55304>.  They include the New Group Proposal Form, Disclaimer, Expenses, Accident or Incident Report, List of Members and Attendance, and General Data Protection Regulations (GDPR) material.

**The Bulletin.**The Bulletin includes group updates, group vacancies, and new,proposed, and suggested groups. It is emailed monthly to all members and some paper copies will be available at Monthly Meetings.

**The Website.**The website is the primary source of information. <https://u3asites.org.uk/edinburgh/home>

The Groups page has an alphabetical list of all groups, highlighting those with vacancies, and then a listing by day of the week. Groups pages are updated regularly and there is also a printable Group List Summary that is updated monthly. If you want to make any changes to your group’s details, please contact your Group Coordinator who will arrange for the changes to be made.

**Finances:**

**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 u3a 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. 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 for group activities should always make the payment to Edinburgh u3a Restricted Fund, and not to the Group Leader or organiser. Preferably, payments should be made by individual members by bank transfer; cheques or cash can be deposited by the Group Leader or the Assistant Treasurer who is responsible for managing the Restricted Fund.

The Assistant Treasurer will arrange for relevant payments to be made on invoice or with the provision of appropriate receipts as requested by a Group Leader.

**Third Age Trust.** The Trust, based in 156 Blackfriars Road, London SE1 8EN (www.u3a.org.uk), is the national representative body of more than 1,000 u3as in the UK, 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 insurance which covers all affiliated u3a groups. A brief description of the insurance cover relevant to Group Leaders (as at January 2024) is given below but the full description of the cover, including limits and exclusions, is provided on the Third Age Trust website: <https://www.u3a.org.uk/edocman-downloads/insurance> You will need to sign up to see these documents. The Insurance FAQs are particularly useful.

**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.

**Money Cover.** Please note that cover is no longer 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 Edinburgh 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 securely. This includes items on loan to Edinburgh u3a. Whilst at any premises other than the home of any member, the equipment must be kept in a locked cupboard or room when the premises are not in use by the u3a.

Note that any equipment used by groups which has been purchased from their own funds or donated to them is deemed to be owned by Edinburgh u3a and so is covered by this insurance.

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

**Tour Operators' Liability.** This provides cover for Edinburgh u3a when organising a short study trip which involves overnight accommodation and when Edinburgh u3a may be deemed a tour operator. To be considered a tour operator, Edinburgh u3a must have organised accommodation plus at least one other element which can be transport or other included tourist services e.g. hire of equipment, entrance fees etc. 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.

NB Day trips are covered by the public liability insurance. Tour Operators’ Liability is not a replacement for travel insurance and members should consider taking out their own travel insurance.

**NB In situations that might result in an insurance claim, Group Leaders should not admit liability or fault on the part of themselves or other members, even where they believe that this is the case. Also, in the event of any claim, Edinburgh u3a is responsible for paying the excess.**

Revised 28/01/2024