

# Elmbridge U3A



## HANDBOOK FOR GROUP LEADERS

Interest groups are a core part of the ethos of a U3A and one of our priorities is to ensure we have a wide range of successful groups available for members.

The success of our groups is the direct result of the inspiration, leadership and efforts of our group leaders.

We have prepared this handbook to help group leaders in setting up new groups and in running established ones. It sets out some ideas on setting up and running groups but focuses on the support available from within Elmbridge U3A and from elsewhere in our regional and national U3A networks.

We sincerely hope you enjoy being a group leader with Elmbridge U3A and find it rewarding.



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## GETTING STARTED

If you haven't already decided, you will need to plan:

- The purpose of the group.
- When, how often, where and how you are going to meet.
- The maximum numbers you can accommodate.
- The time commitment involved. □ What help is available to you.

You can plan these on your own or discuss them with the group at your first meeting.

## ESTABLISHING THE PURPOSE OF THE GROUP

You will need to consider the scope of the subject matter or activities (what the group is going to do) and the level at which the group will work (beginners, improvers, advanced).

## FREQUENCY, TIMING AND DURATION OF MEETINGS

Be flexible at this stage and look at different models – regular meetings; meetings arranged as and when; short courses; or even residential.

## CHOOSING A VENUE

You will need to take into account the size of the group and what the group needs, e.g. chairs, tables, equipment, space for physical activities. Think also about the subject matter and whether it needs a neutral rather than a domestic setting, a formal or an informal ambience.

## SIZE OF GROUP

The appropriate size for the group will depend on subject, treatment and accommodation.

We aim to avoid long waiting lists. To achieve this, it may be necessary for us to have more than one group covering the same or related subjects.

## HOW MUCH TIME CAN YOU ALL COMMIT?

As the potential group leader you should decide how much time/expertise you will realistically be able to offer and what you will expect of the group members. Do not over-commit yourselves.

## WHAT HELP IS AVAILABLE?

Find out what help is available locally, regionally and nationally:

- Talk to our Elmbridge Groups Secretary or a member of the Groups Coordinator Team one of whom will be assigned to mentor and monitor you and the group.
- Look at the Surrey U3A Network web site. There may be relevant study days planned within Surrey or opportunities to meet with others in the area to share experience.
- Register with the Third Age Trust's national web site (<https://u3a.org.uk>) and contact the National Network Coordinator or Subject Adviser for your subject to see what material he or she has.
- Contact the Third Age Trust Resource Centre and register as a borrower.

- Look at the Third Age Trust's *Sources* web site (<https://sources.u3a.org.uk>).

More details are given in later sections of this handbook.

## **THE FIRST MEETING**

There is a large body of research into later life learning which suggests that older people learn best when they are in control of their own learning. Participation by all group members should be encouraged from the start.

It may be useful to have a hand-out for the first meeting in the form of a check-list. This will focus the group and encourages shared responsibility.

You will need to agree your purpose, find out the skills and resources at your disposal and decide on a way of working.

## **FIND OUT WHAT MEMBERS EXPECT OF THE GROUP**

A successful group will be clear about and share expectations. If there is a wide variety of expectation, then consider forming more than one group. If this is not feasible, then plan a programme in such a way that as many approaches as possible are included.

It is a useful exercise at the first meeting to get agreement to a short description of what the group hopes to do and how they hope to do it. This will subsequently form a statement of intent which will help to keep the group on track and will inform potential new members

## DISCOVER THE EXPERTISE WITHIN THE GROUP

It is important to find out what knowledge and experience exist in the group and decide how these are going to be used. You may be fortunate enough to have many group members able and willing to share their expertise, or you may start with just one. You may also start with little or no obvious expertise.

Shared learning does not mean that a group cannot seek to extend its learning base by inviting others to join them either permanently or for specific purposes.

The ethos of U3A is that its members share their knowledge and experience freely, but there may be times when a paid external speaker or even a paid external tutor is desired by the group. However, see the later section on use of paid outside speakers and tutors.

## AGREE THE WAY OF WORKING

Many methods are used by U3As groups including:

- Lectures
- On-line Learning
- Taught sessions with participation
- Shared presentations
- Discussions
- Skills teaching □ Trips and fieldwork □ Physical activities.

All methods are legitimate, as part of the shared learning experience, providing they are suitable for the topic, use the skills available to you and are accepted by the group.

It is not necessary to choose one method for all time: different formats will be suitable for different purposes.

## **RUNNING YOUR GROUP**

A few practical things will help you to run your group smoothly and will help ensure our U3A as a whole is run in an efficient and proper manner:

- The Coordinator team will tell you about Beacon and if you decide to use it, ask to be registered with the system and shown how to use it.
- Keep a list of the members of your group (preferably in Beacon)
- Keep a waiting list for anyone interested in joining but to whom you cannot yet offer a place. When places come free offer them on a first come first served basis to members on your waiting list (if you use Beacon it will time and date stamp waiting list entries)
- Keep a simple record of what your group does - this can be used to brief our wider membership through our Newsletters and other media.
- Group meetings usually include a tea/coffee break and it is customary for members to contribute to the host's costs (currently £1 per session).
- Keep a note of your expenses (e.g. photocopying, printing from a PC, hire of DVD/video, use of Zoom) and ask your group members to share these. We do not wish or expect a group leader to be out of pocket.
- All bookings of accommodation, transport and other services should be pre-authorised by the Treasurer and made in the name of Elmbridge U3A.

- If monies are collected for group visits, meals or other activities, these should be passed to the Treasurer who will subsequently make all payments.

## **SUPPORT WITHIN ELMBRIDGE U3A**

Elmbridge U3A is run by a Committee, elected at the AGM each year. A member of the Committee is appointed “Groups Secretary” to provide Group Leaders with help and support. The Groups Secretary is assisted by a small team of Group Coordinators. You will be introduced to the member of this team assigned to help you. This person should be the first person you turn to for help.

You may also have contact from time to time with other members of the Committee as explained in this Handbook. You will find all Committee members’ contact details on our web site and in our Newsletters.

## **HELP WITH PUBLICITY**

Do you need help in publicising your group in our printed Newsletters, on our website, in the monthly emailed Bulletins or at monthly meetings? Ask “your” group’s Coordinator.

## **ADVICE ON VENUES**

Most of our groups meet in members’ homes but some use hired accommodation. We maintain a list of possible venues. Ask your Coordinator for a copy and help from the Treasurer in arranging booking.

## INSURANCE

In your group activities you are covered by Public & Products Liability Insurance. This covers U3A members and occasional visitors for loss due to accidental injury to a person or accidental loss or damage to property not belonging to them, as long as it arises from or in connection with a U3A activity. You can find a Q&A about the insurance attached to the Members Page of our web site. Should you ever experience such a situation, please contact the Treasurer for advice and an Accident Report Form. Details of the insurance policy and a copy of the form can also be seen on the Third Age Trust website [www.u3a.org.uk](http://www.u3a.org.uk).

Anyone giving lifts to fellow U3A members will be covered by their own motor insurance in the usual way.

## COPYRIGHT

You can legitimately copy material for use by your group. Elmbridge U3A has a licence from the Copyright Licensing Agency which allows multiple photo/digital copying by our members for educational purposes. Contact the Secretary if you have any queries.

## FINANCIAL SUPPORT

Each group has to be self-funding and group members must cover all the normal running costs of their group. However, if a group ever feels there are exceptional circumstances it may ask the Treasurer for help. Loans are available for one-off purchases.

## **SUPPORT FROM THE SOUTH EAST (U3A) FORUM, THE SURREY U3A NETWORK AND THE THIRD AGE TRUST**

### **SUN (THE SURREY U3A NETWORK)**

The Forum can be found at the web site at <https://u3asites.org.uk/southeastu3aforum/home>. It is largely concerned with Summer School links with Universities.

SUN provides a Study Day Programme available to all members of local U3As. Many study days and workshops are run in conjunction with universities. For details visit <https://u3asites.org.uk/surreyu3anetwork/home>.

### **THE THIRD AGE TRUST RESOURCE CENTRE**

The Resource Centre in the National Office at Bromley has a collection of material (other than books) available for all U3A groups to borrow free of charge except for the cost of return postage. There are slides, videos, audio cassettes, CDs and DVDs available in many subject areas. Lists are free and available on request.

You will be issued with a user number that will allow you to search the catalogue online. Loans are for a period of three weeks and may be renewed on request if not needed elsewhere.

You may register with the Resource Centre either by telephoning 020 8315 0199 between 9.30 a.m. and 4 p.m. on Tuesday, Wednesday or Thursday or online at the Third Age Trust's website.

## THIRD AGE MATTERS

Members receive the national *Third Age Matters* several times a year. This contains news from U3As across the country, experiences, ideas, contact details and useful advertising. Some articles may be of interest to group leaders.

## NATIONAL SUBJECT COORDINATORS AND NETWORKS

Group Leaders in individual U3As work together to share ideas and materials. Many subjects have a national Subject Coordinator whom you can contact directly. In some cases there is also material available online that you can use or adapt to meet your needs. Contact details for the Subject Coordinator are given on the Third Age Trust's website.

## ON-LINE COURSES

A list of courses is to be found on the Third Age Trust website. Some have been written by U3A members in the UK, some are from Australia. Their high standard has been recognised by a National Institute for Adult Continuing Education award. They are low cost, some untutored, with tutored ones costing slightly more. Although they may be followed individually, the material may also be used for groups. Untutored courses can be downloaded and printed for group study. You are also encouraged to use the Open University's 'Open Learn' courses.

## RESEARCH COLLECTION

A research collection is currently being built up by the Resource Centre as a reference point. It encompasses a) research about older learners and b) research by older learners including U3A members on any subject. If you can offer such publications, please contact the Resource Centre Manager with details of title, author, any public source and date, marked clearly for 'Research Collection'.

## SHARED LEARNING PROJECTS

A typical Shared Learning Project involves U3A members working with a local institution, such as a gallery or museum, on a project of mutual benefit. These co-operative ventures offer an exciting opportunity for sharing expertise and learning.

The Third Age Trust website describes what shared learning projects are and how to start one. There are also regular reports of such projects in *Sources*.

## TIME TO LEARN

The Department for Business, Innovation and Skills invited the Third Age Trust to prepare a facilitators' handbook for informal adult learning. *Time to Learn* was the result. We recommend it to group leaders. Copies can be obtained from the Groups Secretary.

## A FEW RULES

### WHO CAN JOIN A GROUP?

Membership of an Elmbridge U3A group is restricted to current members of Elmbridge U3A. If you are in doubt about a member's status, seek help from the Membership Secretary.

Repeated attendance by a non-member would disqualify that individual and possibly the other group members from U3A insurance cover.

### PROBLEMS IN THE GROUP

Sometimes issues can arise within a group which disrupt its smooth running and spoil the enjoyment for everyone. Don't leave a problem too long before trying to resolve it. We have an agreed Complaints procedure which you should follow when needed – you can find it in the Reports and Policies section of the Members page of our web site.

Talk to your Groups Coordinator or a Committee member if you are unsure how to resolve the problem or just want someone with whom to explore options.

### PRIVACY AND DATA PROTECTION

You can find our Privacy and Data Protection Policies attached to the Members Page of our web site. The GENERAL DATA PROTECTION REGULATION (GDPR) and other legislation requires us to store personal data securely so as to avoid unauthorized or illegal use and to restrict access to it to those who need it for the purpose

for which it was collected, i.e. in our case contacting or communicating with members. It covers all personal data whether stored in paper or electronic form.

Hence:

- A group leader may hold contact details of the members of the group but must not pass these to others, even other members of the group, without the prior approval of those concerned.
  - However, all members of certain groups, e.g. the Walking group, legitimately need the home and/or mobile telephone numbers of all the other group members for organisational and safety reasons.
- Group leaders are required to give their approval to their own contact details being circulated to all Elmbridge U3A members.
- Emails circulated to large groups of members must place the addressees in the “Bcc” box and not in the “To” box, so that recipients are not inadvertently given the email addresses of any others.

#### USE OF PAID OUTSIDE SPEAKERS AND TUTORS

One-off payments to speakers for fees or the reimbursement of legitimate expenses are not problems. However, if you are planning to ask a freelance leader/tutor/specialist to run a class on a regular basis for an agreed fee, it is essential that you check beforehand that the person:

- Is registered with HM Revenue and Customs as a self-employed person.

- Has a current public liability policy of at least £2 million. The U3A policy does not cover U3A members when a freelancer is being paid.
- Ask the Treasurer for advice before making any commitments.

## FINANCIAL MATTERS

As a charity, we are required to follow sound financial practices. This is one reason for the recommendations on bookings and money handling above. If you have any queries about this, please contact the Treasurer.

**Good luck with your group!**

Elmbridge U3A March 2020

Website: [u3asites.org.uk/elmbridge](http://u3asites.org.uk/elmbridge)