

Handbook for Group Leaders

Interest groups are a core part of the ethos of 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 a direct result of the inspiration, leadership, and the 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 Midhurst u3a and from elsewhere in regional and national u3a networks.

We sincerely hope that you enjoy being a group leader with Midhurst u3a and find it rewarding but please remember we are here to offer any advice or support that we can.

Groups can be led by one or more people.

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Getting started.

- Why are you going to run this group? What is its purpose? Are you going to 'teach', explore together, share experiences?
- Are you planning to run the group on your own or might you share or split the tasks with one or more colleagues?
- How frequently will you want to meet? Although many u3a groups meet monthly this doesn't have to be the case. You could meet more frequently, Spanish was once a fortnight, bi-monthly as in the case of History 2, or even for a short, more intense course. This decision is up to you, you need to consider your own time commitment and that of the group's members.
- What kind of accommodation will you need? Some groups meet in members' homes, some in local cafes and others need a more formal venue that may imply a booking fee. Think carefully about venue – will you need chairs, tables, equipment?
- Consider the maximum number of members you can accommodate. We aim to avoid long waiting lists, to do this we can have more than one group covering the same or related subjects.
- You can plan these things on your own or discuss them with the group at your first meeting or a preliminary encounter, this is often a good idea as so many of our members have previous commitments to other groups/family commitments.
- As the potential leader you should decide how much time/expertise you will realistically be able to offer and what you will expect of group members. Do not over-commit yourselves, this should be an enjoyable experience for you, too.

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.
- At your first meeting you will need to agree your purpose, find out the skills and resources at your disposal and decide on a way of working. It may be useful to have a hand-out in the form of a check list, this will focus the group and encourages shared responsibility.
- What are people's expectations? It is a good idea 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.
- Find out what knowledge and experience exist within the group and how this can best be used to enhance the learning experience of all. Shared learning does not mean a group cannot seek to extend its learning base by inviting others to join them either permanently or for a specific purpose.

- There are many methods used by u3a groups including:
lectures / taught sessions with participation / shared presentations / discussions / skills teaching / trips and fieldwork / physical activities. All methods are legitimate providing they are suitable for the topic and accepted by the group. It is not necessary to stick to one method all the time, they can be mixed and matched as the group desires.
- Agree some ground rules e.g.
 - o Be punctual
 - o Listen to each other
 - o Allow others to speak
 - o Let someone know if you are unable to come
 - o Agree to disagree amicably and be respectful to other group members
 - o Every contribution matters
 - o Have patience with and encourage those who are slower to learn

Feedback what was agreed at the first meeting to your Group Coordinator to finalise arrangements.

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.

- Keep a list of group members and of anyone interested in joining the group but to whom you cannot yet offer a place.
- Keep a simple record of what your group does – this can be used to brief our wider membership through our newsletters.
- Group meetings often include a tea / coffee break, and it is customary to contribute to the costs of the host (currently 50p per session). This money does not need to go through the Treasurer.
- Sometimes groups meet in cafes etc and then it is customary for group members to purchase a drink.
- Keep a note of your expenses (e.g., photocopying, printing from a PC, hire of a DVD / video), and ask your group members to share these. We do not wish or expect a group leader to be out of pocket. This money does not need to go through the Treasurer.
- All bookings of accommodation, transport and other services should be made in the name of Midhurst u3a. See the section on Financial Matters for more detail.
- If monies are collected for group visits, room hire, meals or other activities, these should be passed to the Treasurer who will make all payments. See the section on Financial Matters for more detail.
- Please consider any special requirements that your group members may have and think about how we can accommodate them – large font printing, venues that make access easy for all, etc.

- Checklists/ risk assessments – the Third Age Trust has prepared checklists for various types of venue and activity to help group leaders ensure that their activity is safe, and to help with any insurance claim should the situation arise. Copies are available at <https://u3asites.org.uk/midhurst/page/126810> or from the Business Secretary who can also offer help if required.
- Membership of a Midhurst u3a group is restricted to current members of Midhurst u3a. If you are in doubt about a member's status, please seek help from the Membership Secretary. Repeated attendance by a non-member would disqualify that individual, and possibly other group members, from u3a insurance cover.

Support within Midhurst u3a.

Midhurst u3a is run by a committee, elected at the AGM each year. A member of the committee is appointed 'Groups Coordinator' to provide Group Leaders with help and support. The Groups Coordinator should be the first person to turn to for help. You will find all committee members contact details in our annual Programme of Activities and on the web site <https://u3asites.org.uk/midhurst/contact>.

- We can help you to publicise your group in our annual Programme of Activities, our printed newsletters, our website, our e-Newsletters or at monthly meetings on the 'Pearl and Dean', and the display at the back of the hall. Ask the Groups Coordinator.
- Most of our groups meet in members' homes but some use hired accommodation. The main hall and the side room at the Methodist Hall and various other places can be used. Contact a member of the committee for details and help with booking.
- Midhurst u3a has equipment that you may borrow:
Digital projector
Projection screen
Flip chart board and paper
If you wish to borrow any of these, please contact the Groups Coordinator.
- Insurance. In your group activities you are covered by Public and Products Liability Insurance. This covers u3a members 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. Members allowing their premises to be used for a group activity would be covered up to £25,000 but with a £250 excess. Should you experience such a situation please contact the Business Secretary for advice and an Incident 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
- You can legitimately copy most material for use by your group. Midhurst u3a has a licence from the Copyright Licensing Agency which allows multiple/digital copying by our members for educational purposes. Contact the Business Secretary if you have any queries.

- Each group should be self-funding and group members must cover all the normal running costs of their group. However, if a group feels there are exceptional circumstances it may ask the Groups Coordinator for help.

Support From other sources.

- The Third Age Trust can provide information and advice: see their website To contact them use the contact form on the website www.u3a.org.uk or email info@u3a.org.uk or phone 020 8466 6139. To fully access their website you will need to set up an account – this is very simple, you just need to provide your email address, come up with a password and tell them you are a member of Midhurst u3a.
- Third Age Matters and Sources. Leaders receive the national Third Age Matters several times a year. This contains news from u3as across the country, experiences, ideas, contacts details and useful advertising. Sources is an online blog available at: <https://sources.u3a.org.uk/>
- National Subject Coordinators and Networks. Group Leaders in individual u3as work together and share ideas and materials. Many subjects have a National Subject Coordinator whom you can contact directly. Contact details for the Subject Coordinators are given on the Third Age Trust's website.
- Shared Learning Projects. – a typical Shared Learning Project involves u3a members working with a local institution, such as a gallery or a museum, on a project of mutual benefit. These cooperative ventures offer an exciting opportunity for sharing expertise and learning. The Third Age Trust describes what shared learning projects are and how to start one.

Data protection.

- The Data Protection Act requires us to store personal data securely so as to avoid unauthorised 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 in paper or electronic form.
- A group leader may hold contact details of the group but should not pass these to others 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 members for organisational and safety reasons.
- Group leaders are required to give their approval to their own contact details being circulated to all members of the u3a, and provided to the Third Age Trust so they can be posted copies of the "Third Age Matters" magazine.
- E-mails circulated to a large group of members should place the addresses in the 'Bcc' box and not in the 'To' box, so that each member is not inadvertently given the e-mail addresses of all the others.
- Contact details of former group members should be deleted or shredded.

- Midhurst u3a's Privacy Policy is available at <https://u3asites.org.uk/midhurst/page/126076>

Outings and group travel

- Some groups organise outings for group members which might include coach hire, or block ticket purchase. See the section on Financial Matters for more detail. Check with the Treasurer before making any bookings.
- Members can offer lifts to other members and accept money towards petrol costs without compromising their car insurance policy provided that the driver only receives an appropriate proportion of the fuel cost from each passenger and not the total amount as this would then amount to a private hire fee and require "taxi" insurance cover. This money does not need to go through the Treasurer. Members are reminded that any incident involving the driving of the vehicle would be covered under their own motor insurance policy. This includes injury to passengers and members are advised to check that their insurance policy does cover such an eventuality.

Use of paid outside speakers and tutors.

- Based on our Mutual Aid Principle the intent is to not need to pay for speakers. Certainly, u3as cannot pay a fee to speakers who are members of a u3a. However, it is allowable to pay pre-agreed reasonable expenses to speakers, including u3a members. For external speakers – only if payment is really necessary – then the following should be followed. The speaker's fee and expenses should be agreed beforehand. The cost should then be reimbursed to the speaker through Midhurst u3as's accounts. If the Speaker wants to donate their fee to a nominated charity, then this needs to be recorded in advance. The Treasurer should be approached prior to booking a speaker to agree the process.
- Where a u3a cannot find a member to explain/show a particular topic to the group members, the group leader, with the Committee's consent, may choose to engage a paid tutor for that subject. The Trust is against having paid tutors in principle but u3as are independent charities and can make their own decisions.
- Paid tutors must not be a member of any u3a.
- The Trustees must ensure that the tutor is self-employed, pay their own tax, and have Public Liability insurance. HMRC will have issued them with a UTR (Unique Tax Reference) number which a paid tutor should be able to produce along with a copy of their Public Liability Insurance certificate as evidence that the tutor is not an employee. A once-a-year check to ensure that these measures are still in place is essential. It is the Trustees' responsibility, not the members.
- The group using a paid tutor cannot be subsidised by the u3a.
- If members want to have a group with a paid tutor but the committee do not agree, an option is to make the group a non u3a activity (and hence is not then covered by the u3as insurances).

Financial matters

- As a registered charity reporting to the Charity Commission we must handle our money particularly carefully and follow certain guide lines. They should also make everyone's life a little easier. Please do let the Treasurer know if there is anything you would like to add or if anything is unclear.
- The Treasurer keeps a record for each group's income and expenditure, and the balance in hand, apart from petrol money, money provided to the host for refreshments in private homes, and small sums given to cover copying costs. Please ask the Treasurer any time for an update on yours.
- Please be aware that the group leader or event organiser does not have to be responsible for everything. You could delegate the financial aspects to another member. The ethos of u3a is sharing. Therefore, where it refers to "group leader" below it could say "or other member". Just let the Treasurer know who the contact.

Each group or activity should be self-financing:

- For activities involving meals and drinks out everyone should normally pay for their own direct to the venue unless pre-payment is required.
- If a group has larger costs, such as hire of a hall, a fair amount to pay for photocopying, printing, publications, equipment, or refreshments, the group leader should work out how much is needed to cover this, either over a period or per meeting, collect it from the group members and pass it all to the treasurer as soon as possible. For hall hire this must be in good time for the treasurer to pay the hall management soon after the invoice is received by the treasurer, who will ask the group leader to check the charges. Other expenditure incurred by the group leader should be claimed from the Treasurer, with receipts where possible. The Treasurer will make the reimbursement as soon as possible. An expenses claim form is available on the web site at <https://u3asites.org.uk/midhurst/page/126810>.
- Events such as theatre trips or outings must be charged at cost and all participants must pay. The organiser of an event should not benefit from any discount (e.g. a free place) offered by the organisation providing the event or service. The value of free places should be shared out among all participants to the event. As all u3a members offer their services free to the movement, the organiser(s) must not get any pecuniary reward for organising an event.
The event organiser should pass money received to the Treasurer as soon as possible. The Treasurer will pay invoices for tickets and coach hire. A paying-in form is available on the website at <https://u3asites.org.uk/midhurst/page/126810>.
- Payments by members for group activities or outings can be either cash, cheque payable to Midhurst U3A, or on line to A/c Name: Midhurst U3A; Sort Code: 30-96-61; A/c No: 01387462; Ref: (something to indicate what is being paid for, eg Opera). If payment is made on line the Treasurer will tell the organiser when the payment has been credited.
- Reimbursements from the Treasurer and payment of invoices will be made on line or, if under £10 and practicable, in cash. The Treasurer plus one other Trustee (but not

the payee) are required to authorise on line payments, therefore it may take a day or two to arrange payment.

Problem solving

- Sometimes issues can arise within a group that disrupt the smooth running and spoil the enjoyment for everyone. Don't leave a problem too long before trying to resolve it. Talk to your Group Coordinator or Committee if you are unsure how to resolve the problem or just want someone to explore options with. You can also ring National Office if you want to talk something through or check something out.
- Issues between group members - Where there is potential for friction it is advisable to begin by bringing it into the open. Either you or another person could try to facilitate a discussion either with the members concerned or with the whole group, but it is important that the facilitator remains neutral and non-judgemental. If you cannot reach a resolution informally speak to your Group Coordinator or a member your Committee. If a situation does not resolve and becomes acrimonious your Committee can consult the advice on disciplinary procedure provided by the Trust. There are also Trust Volunteers trained to support with resolving disputes.
- Non-attendance – sometimes people join groups and then do not attend regularly. This can be a problem if there is a waiting list to join a group, or if the participation of all group members is required for the group to function eg a rota is maintained for individual members to give presentations as in the history groups, or if the group numbers are capped by its activity but cannot function if too many members are not present eg the Food Group. Midhurst u3a Committee has agreed that Group Leaders faced with this situation can warn the poor attender that if they are unable to come regularly, that they will have to leave the group. The member should be given a chance to explain what the problem is, or to improve their attendance. If in doubt the Group Leader should discuss the situation with the Groups Coordinator.
- Safe-guarding issues – some people are potentially at risk of abuse and neglect. Abuse and neglect can take place in a person's own home, in the home of a carer, family member or friend. If you have concerns about a group member, please contact the Chairman, Business Secretary or Groups Coordinator. The situation should be treated as confidential. Midhurst u3a has a policy covering safe-guarding – available at:
<https://u3asites.org.uk/files/m/midhurst/docs/safeguardingpolicyandprocedureformidhurstu3aweb.pdf>
- Complaints – we would hope most issues could be resolved through informal discussion. If this is not the case Midhurst u3a does have a formal complaints procedure available on the web site here:
<https://u3asites.org.uk/files/m/midhurst/docs/midhurstu3acomplaintsprocedure.pdf>
Contact the Groups Coordinator or Business Secretary if you need help.

Accidents and incidents

- Report all accidents and incidents to your committee as soon as possible and complete the incident form. The form is available on the Midhurst u3a website or from the Business Secretary. It is as well to have an accurate record in case of future problems relating to the incident. Remember that the Third Age Trust provides insurance for group activities

Policies and procedures

- Your Committee and/or Group Coordinator will advise you of the U3A Insurance arrangements as well as policies and procedures that you need to be aware of. Copies are available on the Midhurst u3a website at:
<https://u3asites.org.uk/midhurst/page/126076>
- It is recommended that you also have a look at the advice section of the National Office website where a range of useful information can be found. It is also a good idea to sign up to the newsletter that is sent out by the Trust every month as this will keep you up to date with wider U3A news. You can sign up to the newsletter via the national website.

If you have any queries, please do not hesitate to contact the Groups Coordinator who will assist you in any way possible. Above all, have fun and enjoy running your group.