

# Newport (Shropshire) U3A

## Policy: Procedures for Group Leaders/Contacts

All groups must have completed a “First meeting of your interest group” form. See our Newport (Shropshire) U3A website.

### **A Group membership**

1 Ensure everyone attending the session is a current member of Newport (Shropshire) U3A or registered as a visitor.

2 Non-members/members of other U3As may attend the group session twice in any 1 year and should be recorded as visitors.

3 A ‘group’ consists of a minimum of 4 members of whom 2 are nominated Leader/Contact

4 Group leaders/contacts (GLCs) should have a list of members’ names, contact details and preferably emergency contact information. If a member has no email address, record ‘no email’. If additional personal details are required, e.g. personal addresses, these are held by the GLC with the member’s permission. All such information must be safeguarded according to the Data Protection Act (DPA) Privacy Regulations. (See also our DPA Policy). GLCs have membership forms for new members, also a list of forthcoming speakers.

5 Members requiring a carer to attend meetings do not have to pay for a carer. (Further information regarding carers and U3A is available on the U3A website [www.u3a.org](http://www.u3a.org))

### **B Register**

1 Using the Registration form V7 (see our website) at the start of each session, complete the top part of the register.

2 After signing in yourself, pass the register round, each member to print name, U3A membership no.

3 New members to the group should add contact details and ‘V’ on their 1<sup>st</sup> visit, even if staying for only part of the session.

4 GLCs should indicate to new members, the insurance information at the foot of the form. Further information regarding insurance is available from [www.u3a.org](http://www.u3a.org)

5 Complete the financial section if necessary.

6 Ensure latecomers register.

7 If any member has an accident in a session, record details on the Accident Report Form (see our website), keep a copy of the form and hand one to the groups Co-ordinator.

8 After the meeting, GLCs sign and date the completed register and return it plus any monies to the Treasurer at the monthly meeting or at another pre-arranged time. If no money is involved, return the register to the Groups Co-ordinator.

9 After annual membership renewal, all members must show their current membership card.

10 Any data no longer needed must be deleted within 6 months.

## **C Finances**

1 **All** monies paid to GLCs must be paid into our Newport (Shropshire) U3A account as soon as possible.

**NO** monies should be paid into personal accounts.

2 It is U3A policy that groups are self-financing regarding venue hire, materials/equipment. However, equipment costing over £50 can be bought from U3A funds subject to completion of the form "Application for funding for interest group equipment" (see our website). This form must be given to the Treasurer **before** any purchase is made. **No retrospective refunds will be given.** (see Treasurer for financial guidance if required)

3 Weekly /block booking fees must be paid to the **Treasurer**

4 Out-of-pocket expenses such as photocopying, 'phone calls, may be claimed from the Treasurer on presentation of a bill. **All other tasks are performed voluntarily with no financial recompense.**

## **D Resource Centre List**

This is available from [www.u3a.org](http://www.u3a.org) As a member you may register online to use it. There is a vast range of topics offered and varied media types to cover them.

## **E Hiring venues**

A If a venue other than a member's home is required, the GLC may contact the Groups Co-ordinator for advice regarding availability and cost. This information is then passed on to the Treasurer who will book and arrange payment. This is usually a block booking to be paid in advance. If this is not feasible, GLC must liaise with the Treasurer and Groups co-ordinator. **Under no circumstances may GLCs enter into any contract or payments for venues.**

B GLCs are responsible - with advice from the Groups Co-ordinator - for completing the 'Venue Risk Assessment Checklist' (see our website) together with the venue caretaker before the 1<sup>st</sup> meeting. This needs to be done once and GLCs should keep a copy of the form as well as giving the Groups Co-ordinator a copy. GLCs are responsible for checking that the venue/equipment is safe on each time of use.

## **F Equipment (See also Policy: Property & Equipment)**

Any equipment purchased will be recorded on an inventory kept by the Treasurer and any loss or damage must be reported as soon as possible to the Treasurer who will take any appropriate action.

## **G Meetings in members' homes**

Where meetings are held in homes, members should agree an amount to give the host in lieu of simple refreshments. This is a private donation and does not need to be recorded.

## **H Information on the group activity**

A This is given to the Groups Co-ordinator for inclusion in the Interest Groups information available for monthly meetings, newsletter and our web site.

B Where photographs of activities are included members should be advised so that if they object, they may remove themselves from the situation.

C Regarding U3A's aim to share and further educational activities, GLCs should try to arrange for an annual review of activities with their members to encourage their participation in project planning and development. There is an 'Interest Group Review Form' on our website.

**To be reviewed annually at the January committee meeting**

Proposed by V Evans

Seconded by C Graham

Date of review 15/01/19