



Group Leaders' Handbook

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The Third Age Trust (the UK national body which provides support to all u3as) has many useful supplementary reference documents available online through www.u3a.org.uk . To access these documents, however, you will need to set up a personal account – a very simple process - via their home page.

1. Introduction

Without Group Leaders Perth u3a could not function. This handbook aims to provide all the information you need, together with some ideas for running a successful group. The handbook is available on the Perth u3a website (follow the **Groups** link to the **Information for Group Leaders** link); and paper version can be provided to groupleaders without internet access they will be unable to access materials from the national u3a website.

Comments on how the content can be improved are welcome and should be directed to the Groups Coordinator.

2. Responsibilities of a group leader

The group leader's role is essentially to keep the group functioning and it should not be an onerous task to do so; co-leaders can be nominated if it is. The main responsibilities of a group leader are to:

- Decide on the maximum group membership taking into account the nature of the group and the meeting place.
- Decide with the group how it will operate, what it will do and who will be involved in delivering the content. The group leader is not expected to do everything – their role is to facilitate and administer the group.
- Provide a brief summary of what the group does, and where and how it operates to the Perth u3a Website Coordinator who will place the information on our website.
- If it is not a house group liaise with the Accommodation Coordinator about the requirements of the group and its meeting times.
- Respond to the Programme Editor approving the group details as they will appear in the programme for the next session. You will receive a message in the early summer about the programme.
- Contact existing group members before Registration Day to find out if they wish to continue in the coming session.
- Be present on Registration Day (or ensure someone from the group is there) to speak to members interested in joining the group and to compile a register of group members and/or a waiting list.
- If a waiting list becomes necessary liaise with the Groups Coordinator about possibilities for starting a second group if the level of interest justifies doing so. The Groups Coordinator needs to know the numbers of members on waiting lists and this is best done by keeping the group details updated on Beacon (the u3a membership database).
- Update the list of group members on Beacon after registration. Group leaders are strongly encouraged to register with the Beacon Administrator to access Beacon so that they can enter the names themselves and keep the database up to date thereafter.
- Keep group members up to date about the activities of the group. Email communication with group members is available through Beacon.
- Arrange to borrow any equipment, such as laptop, data projector or screen, if needed. A request can be sent to the Equipment Officer via pigeon post on the website at: www.u3asites.org.uk/perth (click on **Groups** → **Information for Group Leaders**).
- For groups meeting in public premises, liaise with the venue, familiarise yourself with the health and safety arrangements there and make these known to members.

- For meetings not held in Unit 7 inform the venue as soon as possible if a scheduled meeting is not taking place and let the Accommodation Coordinator know so that u3a will not be charged for the session.
- Notify the Committee Secretary via the **Contact** page of Perth u3a website with news and information about the group worthy of inclusion in the regular publication of **News Roundup**.
- Keep a register of attendance at each meeting of the group.
- Attend the annual meeting (normally March) of group leaders.
- Submit an annual report to the Groups Coordinator about the group's activities. This is incorporated into the Perth u3a Annual Report for the AGM in May and thereafter placed on the website.
- Seek a replacement leader, in consultation with the Groups Coordinator, when you wish to relinquish the role.

3. Setting up a new group

Any member is welcome to suggest the creation of a new interest group. The Groups Coordinator will help in identifying potential members, gauging the level of interest, and discussing how the group will operate. It is not essential to identify a group leader before the group starts, but it is necessary to have someone willing to act as interim leader until a member is willing to fill the role in the longer term. If a new group is set up to accommodate members on a waiting list the existing group leader can be a big help but they are not expected to lead it. It may be that someone from their existing group would be willing to do so, in which case being prepared to 'buddy' a new leader is extremely useful in building up their confidence and passing on valuable experience.

The first formal step in setting up a new group is securing Committee support. A simple proforma (downloadable via **Groups → Information for Group Leaders → Documentation**) needs to be completed then submitted to the Committee for approval, after which support will be available to get things off the ground, and insurance cover commences.

Where possible new groups are encouraged to start as house groups. Perth u3a has leased accommodation available to groups in Unit 7 at the Perth Business Centre, Glasgow Road. Should this accommodation be needed then the Accommodation Coordinator needs to be engaged for advice on the availability of Unit 7.

4. Ground rules for interest groups

The following points are intended to make your task as easy as possible.

- All members of a group must be paid-up members of Perth u3a and it is the group leader's responsibility to ensure that only paid-up members attend group meetings. The status of a member's subscription can be quickly confirmed through Beacon. However, as an inducement for prospective members to take up full u3a membership, group leader's may permit the attendance of non-u3a members at a single group meeting on a one-off 'taster' basis.
- Members who sign up but then do not attend meetings can be problematic, particularly if there is a waiting list for the group, and the Committee has therefore agreed that members who fail to attend, or to send apologies on reasonable grounds, on 3 successive occasions

will be deemed to have forfeited their membership of the group. You may inform them of this and invite a member on the waiting list to take their place.

- The general rule for walking groups is that dogs are not allowed due to the risk to livestock and difficulties with car sharing. The Committee has, however, agreed to the presence of dogs on a case-by-case basis provided they are kept on a lead and with the Group Leader's agreement.
- You are not expected to handle money, other than minor amounts for refreshments or for special events. Payment for all accommodation is made through the Treasurer at the request of the Accommodation Coordinator. The cost of hired accommodation for groups meeting monthly is met by Perth u3a so group members are not expected to make a contribution over and above their membership subscription. Exceptionally, groups that choose to meet more frequently will normally be expected to contribute to the extra venue cost. Any other activity involving cash should be discussed with the Treasurer in advance.
- Most groups meet once every 4 weeks with some meeting fortnightly and a few weekly. The frequency of group meetings should be discussed with the Groups Coordinator when the group is set up and any changes must be agreed by the Committee in advance.

4a. Group expenses

From time to time group leaders and members of groups may incur expenses, such as the purchase of materials or equipment, necessary for the functioning of the group. The Committee has decided that to budget for a fund for each group would unreasonably increase the annual subscription charge, so as a general principle the costs of such items must be borne by the members. Group leaders must request prior authorisation from the Committee through the Treasurer for reimbursement of exceptional expenses. Under no circumstances may a claim be made for payment of a fee, donation, or travel expenses for a visiting speaker.

4b. Events, outings and site visits

External visits are at the expense of members over and above the annual membership fee. Payment for such visits should be made on invoice by the Treasurer and be processed through the u3a bank account. The organiser of such events is responsible for collecting payments from members, which are then paid into the Perth u3a account. You should make clear to members booking places on an outing that the cost is payable on booking and that no refund can be promised on cancellation of a place unless the member finds a replacement. Advance notice should always be given to the Treasurer. In some cases it will be appropriate for members to pay their individual entrance fees to the visited venue. Guidance should be sought when this may apply prior to making any arrangements.

5. Formalities and Legalities

5a. Health and Safety

It is important that Perth u3a operates in a safe manner. The Health and Safety Coordinator is the Committee member responsible for Health and Safety matters and can be contacted via the Secretary. A Health and Safety document for Perth u3a is available on the website through **How we work → Documentation**. The document has specific guidance for walking groups. In addition to the need for all group members to be familiar with the emergency procedures in force on paid premises, group leaders should know the contact person for the venue and be aware of the location of first aid equipment:

5b. Accidents and emergencies

- In the event of having to contact the emergency services you should know the postcode of the premises you are using.
- Guidance on dealing with accidents and emergencies can be found in the Health and Safety document.
- All accidents and emergency incidents must be reported to the Committee using the incident report form available on the website from **How we work → Documentation**.
- It is sometimes necessary to contact a friend or family member if a group member is taken ill. It is a delicate matter to broach this in advance but it might be worth speaking with the group at the beginning of the session about this eventuality. Some people will keep an ICE (In Case of Emergency) number on their mobile phone. For groups undertaking potentially risky activities such as hill walking it is good practice to compile an emergency contact list and to hold a record of mobile phone numbers for participants.
- Do not rely on the expertise or past professional knowledge of group members – it may be some time since they last practised and their professional registration may have lapsed. If in doubt call the emergency services.

5c. Access and inclusivity

Every effort is made to use accessible venues and the Third Age Trust has issued guidance on accessibility for disabled members. Group leaders should be sensitive to members with any sensory impairment which makes it harder for them to see or hear the proceedings. There are often simple steps which can alleviate such difficulties - such as ensuring that contributors always speak loudly and clearly, or using PA equipment. Again, the Third Age Trust has provided guidance on support for members with sensory impairment.

5d. Insurance

Third Age Trust provides several different forms of insurance for local u3as and their website has a variety of relevant information. For insurance purposes all those taking part in u3a activities must be paid-up members and a register kept at each meeting.

5e. Licences

There are copyright issues in respect of music, film and publications so you should take care when photocopying materials, playing music or showing films. Third Age Trust provides licences for local u3as; details of what they cover are available from the Secretary. Further information about copyright issues can be found on the Third Age Trust website.

6. Ideas for keeping groups lively

You may sometimes experience the feeling that your group is stuck in a rut, has lost its way or needs a new injection of ideas or enthusiasm. If this is the case it is not just a matter for you to address but one in which every member should be involved. Some possible responses are:

- Discuss with the group the possibility of another member taking over as group leader/facilitator, either temporarily or permanently.
- Consider revising the group's remit to take it into new areas of learning.
- Try introducing input from new sources. Some groups have successfully used Open University course material and often audio visual materials are available on relevant themes. There is a wealth of online study material through Massive Open Online Courses (MOOCs) - these are free and easy to use. Find out more by doing an online search for

'MOOCs' or visit the website of one of the leading UK MOOC providers. The Third Age Trust also offers advice on using MOOCs.

- Contact the appropriate national subject adviser - there are details in every issue of *Third Age Matters*. Some subjects have newsletters or start-up booklets. Through a subject adviser find out which other u3as have a group on the same subject and see if they can provide new ideas.
- Consider adopting the 'Shared Learning Group' model and undertaking a special time-limited project.
- The Third Age Trust has some useful online information on keeping your group vibrant.

7. General information about Perth u3a

It is assumed that you know something about the organisation already but the following non-exhaustive list of items of general information may be useful:

- **Constitution.** This can be found on the Perth u3a website via **How we work → Documentation**.
- **Committee.** Details of current members and their roles can be found through **How we work → Committee**.
- **Data protection.** In accordance with the provisions of the Data Protection Act access to the membership database (Beacon) is restricted. Perth u3a's data protection policy is set out at **How we work → Documentation**.
- **Committee minutes.** These are available via **How we work → Committee → Committee minutes**.
- **Code of conduct for committee members.** This is set out in **How we work → Documentation**.
- **Membership.** Anyone not in full time employment is eligible to join u3a. The website has a membership form at **Contact → join us → Membership form**. Sessions run from late Summer to the following May and a reduced membership fee applies after 1 January.
- **4 week cycle.** Groups have a slot in the programme on a 4 week cycle. This means that meetings do not always fall in the same week of the month but the programme sets out clearly how the cycle works with the dates for each group meeting. There is a break from mid-December until after New Year, and the last cycle falls before the AGM in early May. Some groups (particularly outdoor-orientated) continue to operate over the summer.
- **Communication.** Perth u3a publishes a **News Roundup** every 4 weeks throughout the session. This is an important means of sharing information and copies are available from the **News** page of the website.

8. The U3A movement

The University of the Third Age (u3a) movement allows retired and semi-retired people to come together and learn together, not for qualifications but for its own reward. Members share their skills and life experiences: the learners teach and the teachers learn, and there is no distinction between them. The u3a movement is supported by its national organisation, the Third Age Trust, which has a series of online articles about the underpinning principles of the u3a. Additionally,

- All u3a members are entitled to receive the magazine *Third Age Matters* as a part of their membership benefits.
- Subject advisers are a valuable resource for group leaders.
- Summer Schools and other events are available to members.
- The Third Age Trust office in Bromley, Kent holds a stock of materials available on loan in its Resource Centre.

There are now about 50 local groups in Scotland with Perth u3a being one of the longest running and largest. Scotland has a representative trustee at the Third Age Trust. Occasional meetings of representatives of all Scottish u3as are held and conferences and events are organised. For more information visit <http://u3asites.org.uk/code/u3asite.php?site=808>