

Guidelines for Group Leaders setting up and running an Interest Group

- a. Any new Group must be **discussed** and **cleared** by one of the **Groups' Coordinators**.
- b. *It may be beneficial to have a meeting with interested parties before starting the Group to discuss the way forward.*
- c. Should a **venue** be required there is a list of suitable venues available from the committee. If any ongoing contract with a venue needs to be agreed, it must be signed by an **Officer of the Executive Committee**. Any **venue hire costs** must be covered by your members. *A new venue, not used before by our U3A will need to have its own public liability insurance to cover defects with the building.*
- d. **Risk Assessment** for a venue needs to be considered. *(Filled out form and checklists available.)*
- e. The frequency of your meetings/events will need to be established trying to avoid too many other groups with other activities at the same time. *(See Events calendar on our website.)*
- f. **Attendance** needs to be recorded by a tick or members sign themselves in at the commencement of their activity.
- g. It is always useful to have **contact details** for all **your group members** so they can be notified should there be any changes and have a **deputy or leaders** working as a team, who can have a copy of the members' list and can stand in if necessary for holidays, sickness etc.
- h. The **Secretary** and the **Website Administrator** will need to be advised of your group, its activities and meeting times for the Newsletter and Website to encourage new members to your group. *Newsletter printing deadline is 2 weeks before a General Meeting.* More detailed information (e.g. charges) goes on to a central spreadsheet *(at the moment maintained by the Website Administrator.)*
- i. Groups must be **self-financing** and can hold a small balance of **£50** anything over this must be passed to the **Treasurer** who will hold it in the U3A bank account on behalf of the group. *You cannot hold a bank account for your group. Where possible obtain receipts for any spends.*
- j. A copy of the **standard Accounts sheet** should be completed as at **28th February, 30th May, 31st August and 30th November** and sent to our **Treasurer**. *If there are **no** accounts, a **nil** return should be sent to the Treasurer preferably on an Accounts sheet or in an email with topic and interest group shown on subject line. If individual members pay direct to the venue for the cost of using that venue and for any refreshments, these items of cost do not have to be included in the group's accounts sheet.*
- k. **Booking** and **paying** for events and activities for a group of U3A members/interest groups – payments are **NOT** to be made using **personal credit/debit cards**. - Using these personal cards can cause difficulties with accounting for all of the money and not necessarily getting everybody's money back if a supplier goes into administration. The Treasurer has a U3A credit card and will be happy to assist in its use. *(See Policy Document for further details.)*
- l. Please consult with our **Secretary** if **licenses** for music etc. are required.
- m. Our U3A has **Public Liability Insurance cover** for all groups, and insurance for damage to any home contents belonging to a U3A member hosting a group in their home. *(Further details available.)*
- n. **Non-members of our U3A** cannot attend any interest group meetings without the express permission of the group leader and this would be for a single taster meeting/activity only, providing this is NOT at the exclusion of a member. *Non U3A members are NOT covered by our U3A Public Liability Insurance in venues when out and about at U3A events and need to be made aware of that. (If U3A at fault) Such visitors should be encouraged to join our U3A.*
- o. Combining with interest groups from **other U3As** – **both** Executive Committees need to be **informed** and give **approval**. *(Unlikely to be a problem with our Executive Committee.)*
- p. **Car Sharing** – Guidelines as to how to manage and recommended charges for this is on our website. <https://u3asites.org.uk/slh>
- q. Copying/printing costs guidelines available in our Policy Document on our website.
- r. **Data Protection** – Please can you send all emails to members as **BCC** as a measure of security.
- s. There is a **U3A mobile phone** and a **First Aid Kit** available when going on any trips via the Trips' Co-ordinators.
- t. Any interest group organizing a day trip involving the collection of money from members, needs to contact the Day Trips' Co-ordinators beforehand. *(See Policy Document for further details.)*
- u. Useful **contacts** can be found in the monthly **Newsletter** and the **Policy Document** is helpful for groups.

There is further advice offered on the National U3A website www.U3A.org.uk under 'Members section'