

# Information for Group Leaders

## Introduction

- As a Group Leader you are central to what St Ives (Cambs) u3a does
- The Group Support Team are here to support you, and currently comprises:
  - [Bruce Hanworth](#), [Joy Cooper](#), [Peter Cooper](#), [Anne Bannell](#)
- This document aims to lay out all the practical information you need as a Group Leader, and point you to where you can find out more
- For the most up to date version see “[For Group Leaders](#)” on the website
- And also there the generic advice in the national [u3a Group Leaders Handbook](#)
- If you read this electronically clicking on any of the links (blue/purple and underlined) will take you where it says
- Please give feedback to any of the Group Support Team - contact details below
- You can bring questions and suggestions to the Group Support Desk - after each Open Meeting until 3.30pm

## Website

- Our website is <https://u3asites.org.uk/st-ives-cambs/> - this is continually updated
- Click on the link above to access it, or copy it into your browser (e.g. Google)
  - Even better: “bookmark” it
- Click on the [Groups](#) tab on the website to list all current groups and their pages
- From there, the “[For Group Leaders](#)” page should have the information you need
  - If not, just ask and we can add it to the website

## Group web page(s)

- Each group has at least one dedicated web page, and this enables you to communicate about your group both to members and non-members
- For example, you can mention what you do, how often the group meets, when and where, what your programme is, and whether the group is currently full
- It is up to you how much you put on your web page(s), and how often you update them, but please make sure they always look up to date
- You can get ideas on what to do with your web page(s) by looking at other groups, or other u3as

- See the “[Guide for Group Page Editors](#)” for guidance and instructions –it is simple to create a simple page for your group, but you can do more if you want
- If you prefer, maybe you can ask another member of the group to be your group’s “page editor”
- [Peter Cooper](#), our Web Manager, is happy to show you how to do things (and to actually do the changes for you if you are not confident doing them yourself)

## Venues

- Where you meet is up to you and your group – some groups meet in homes, others in larger premises
- Bear in mind that all costs need to be shared by members (see Finances below)
- The [Venues](#) page on the website has details of venues in and around St Ives, with details of capacity, costs, facilities and contact details, such as we know them
- On the same line of the “[For Group Leaders](#)” page is the current Insurance cover note, should you need it

## Running a meeting

- On the [Membership](#) page of our website you can find links to the [Member Code of Conduct](#) and the important [Principles of the u3a](#)
- No group is allowed to engage and pay a teacher - the idea is that we are all teachers and we are all learners
- Please ensure that members wishing to join are current members of St Ives (Cambs) u3a by noting the number on their membership card, and checking the Beacon database (if you are not a Beacon user please ask the Beacon Admin or Membership Secretary to check this for you)

## Beacon

- Beacon is an online database, available to group leaders, which enables group leaders to:
  - manage data relating to their group
  - send out group emails (particularly useful for larger groups)
  - monitor whether their members have paid their current u3a subscriptions
- A short training session is all that is needed to use Beacon – see contacts below

## Financial responsibilities

- Each group must be self-financing - this means that the costs associated with any group activity must be covered by the members taking part in that activity
- The amount charged to members will vary according to the activity and the venue used

- For some activities, it is more practical to estimate an amount to be collected on the day, but usually a group leader will estimate the expected costs for a term ahead, taking into account room hire, materials to be purchased for group use etc
- It is reasonable to include printing costs where copies are provided for a group activity
- A subscription can then be collected from members before the term commences
- Please note that, once collected, group funds become the property of the u3a and cannot<sup>1</sup> be returned to the members if there is a surplus at the end of the term
- Any surplus should be carried forward to the next term and used to offset the amount requested for the new term
- Alternatively, you could request a minimum amount at the beginning of a term but warn members that a further subscription may be required if costs exceed the estimate
- If a group decides to close, any remaining funds should be transferred to general reserves (via the Treasurer), and any materials and equipment should be returned to the group support team
- The Treasurer is happy to answer questions – see contacts below

## Bank Accounts and Cash

- National guidance states that no group should open a bank account in its own name
- It would be reasonable for a group leader to open a separate personal account through which the group finances can be run
- The u3a insurance policy states that cash kept in the home is covered up to a limit of £1,000, provided the cash isn't kept for too long a period and subject to the usual precautions of locking your home
- It is most unlikely that any group would need to hold cash on this scale but it is reassuring to know that smaller amounts would be covered
- It is important to keep records of subscriptions collected and sums paid out
- Any invoices or receipts should also be retained - this is not because anyone's integrity is in doubt, but for a leader's own protection in the unlikely event that a group member may question how the funds have been spent
- Group Leaders also need to be able to provide a brief statement of income and expenditure for the running of their group at the end of the year (because the Charities Commission may request such a statement)
- The Treasurer will let you know when this is required, and it will be sufficient simply to provide a figure for total income received and a figure for total expenditure over the period of a financial year (1st January to 31st December)

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<sup>1</sup> The one exception to the above would be in unforeseen circumstances, such as occurred in March 2020 when Covid necessitated an unexpected and immediate suspension of activities

- If you have any questions or concerns about finances in relation to running your group, please do not hesitate to contact the Treasurer – see contacts below

## Insurance Policy

- All group activity is covered by the u3a Public Liability Insurance Policy
- This is renewed on 1st January each year by the Third Age Trust on behalf of all u3as, and is uploaded to our website on the Committee page, from where it can be downloaded (eg if you are requested to provide a copy to a venue making a booking)
- It is also available on the “[For Group Leaders](#)” page

## Key Contacts

See also the [Contacts](#) page of our website for a fuller list for our u3a

### Group Support Team

Bruce Hanworth	Group Liaison	<a href="mailto:bruce.hanworth@gmail.com">bruce.hanworth@gmail.com</a>
Joy Cooper	Beacon Admin	<a href="mailto:beaconadmstivesu3a@gmail.com">beaconadmstivesu3a@gmail.com</a>
Peter Cooper	Web Manager	<a href="mailto:peter@pcooper.me.uk">peter@pcooper.me.uk</a>
Anne Bannell	Assistant Web Manager	<a href="mailto:annebannell@btinternet.com">annebannell@btinternet.com</a>

### Officers

Brian Gilmour	Chair	<a href="mailto:chairstivesu3a@btinternet.com">chairstivesu3a@btinternet.com</a>
Pat James	Treasurer & Membership Secretary	<a href="mailto:Treasmemstivescambsu3a@outlook.com">Treasmemstivescambsu3a@outlook.com</a>

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