

SUDBURY U3A GROUP LEADERS ADVICE SHEET

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1. The importance of “Interest groups”

All U3As are independent of central management except they each have a constitution which generally mirrors that of the Third Age Trust (TAT). How we operate is largely dependent on what our members want. Our U3A has evolved into having a balance between social and academic activities, and our monthly meetings and our present Interest Groups clearly indicate this.

But more than anything we need to have Interest Groups that people will want to belong to. Otherwise our existing members might leave, and others won't see any reason to join us. So we are *“the life blood of U3A”* (ref.TAT)

2. Our Constitution

Our U3A is run by an elected committee, all of whom are Trustees of our branch. Our Constitution mirrors that of the Third Age Trust and can be found on our web-site.

All Group Leaders represent our U3A in their activities, so whatever they do is in fact on behalf of the U3A. So, for instance: if there is an accident during a walk organized by the Walking Group, U3A could be responsible. If anything goes wrong during a group meeting that might result in an insurance claim - it's our U3A's insurance. If a group is criticized for being too casual over safety precautions, it's our U3A that is responsible. If the group's finances get in a muddle – it's our U3A's trustees who are held responsible in law.

3. The job of the Group Leader “In each group there will be one person who will take on the central role. It is one of the tenets of U3A that the group leaders are drawn from the membership and that group members must also be members of U3A. The role of the group leader is to guide a group through a course of study in which they may, or may not, lead the learning. Most people prefer a democratic style of leadership; responsibility is shared with the group and people are expected to take an active part. Different subjects will make different demands on the group.” (ref. TAT)

When a Group Leader finds their group is full, the Groups Co-ordinator should be kept informed and solutions considered. A list of names of prospective members should be kept.

4. Responsibilities of the Group leader.

Our Group Leaders aren't independent. The ultimate responsibility for what happens in our U3A rests on our Trustees, who are the members of our Executive Committee. This means that Group Leaders have to follow some simple rules, mainly relating to Finance, Health and Safety, which should not detract from the main emphasis of a Group Leader - to help the members of his group. It is essential that Group Leaders ensure all members have joined / rejoined our U3A, by checking all membership cards annually, June is a good time to do so.

4a. Financial

Half yearly report – money in and out

If your group has to pay out money (perhaps to rent a room or hall) and then charge its members to recover the cost, we need a very simple expenses statement at the end of each 6 months i.e. at the end of June and December. You need to keep a record of everything you spend (together with receipts as far as possible) and receive. At the end of the 6 month period complete the simple return, available on the web-site or from the Treasurer, and return it to the Treasurer. If you have any problems completing this form please talk to the Treasurer or Groups Co-ordinator.

Annual report – “nil return”

Some groups, particularly those meeting in members' houses, have no or very minimal transactions, merely charging members for tea, coffee and biscuits to repay the host. For these only a “Nil return” is required, but it is **essential** that the Treasurer receives this at the end of every financial year, so that all groups are accounted for - send a simple note by email or post e.g. "x" Group - nil return".

Spare cash.

It is acceptable for you to maintain a small cash float appropriate to your group's needs. Larger amounts should be given to the Treasurer who will keep them in the dedicated “Groups account” where they are available to be drawn down as needed.

It's important to note that groups should not make a profit.

4b. Health and Safety

Again, we have tried to make this as simple as possible. It's in two parts; a “risk assessment” to confirm that you've taken all reasonable precautions to make sure that the venue is safe and a check on the day to ensure it's still OK. It's really common sense, and the checklists are just to make sure you don't miss anything.

Workshops have some different hazards, so we have a separate checklist for group leaders who use workshops. Similarly the safety requirements for walkers, amblers and cyclists are different.

Checking of our electrical equipment is not required, but if you use any equipment and notice any electrical problems please report them to the Chairman. If you use any other electrical equipment it is your responsibility to ensure that it is in safe working order.

4c. Accident reporting

But even after you have evaluated the possible risks and taken all the precautions yet something goes wrong resulting in an accident – report it to the Secretary as soon as possible. It may become necessary to bring our insurers in, and they will need to know what happened. We have a form to help you to provide a full report, so please use it – even if the accident might appear to be of little significance. It might become more so later.

"Group Leaders' Booklet Appendices"

- Appendix 1 *Venue Risk Assessment*
- Appendix 2 *Group Travel Risk Assessment*
- Appendix 3 *Workshop Activity Risk Assessment*
- Appendix 4 *Walk / Ambling/ Cycling Leader Checklist*
- Appendix 5 *U3A Insurance*
- Appendix 6 *Accident Report Form*

These lists can be found as a link on the Groups page of our web site. They are to help you ensure that you haven't missed anything in trying to look after your group. The Trustees rely on you to refer to them and make sure you address all risks. It would be excessively bureaucratic to ask you to fill them in on every occasion and send them in to the Trustees.

You might feel it worthwhile however to go through a checklist and tick the boxes as appropriate to keep for your own records – perhaps annually.

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