

## GUIDELINES FOR GROUP LEADERS

**If you need support of any kind, email the Groups Co-ordinator at [groups.thorleyu3a@gmail.com](mailto:groups.thorleyu3a@gmail.com)**

### **To start an Interest Group**

- Decide on a group name.
- Decide on a venue. If you need help finding a venue the Groups Co-ordinator can advise.
- Many groups meet in members' homes, coffee shops and other free spaces, but larger groups may need to pay for a meeting place.

### **Leadership**

Many groups have a single leader, but you may find it easier to share the load between two leaders, or even to form a committee to run your group.

### **Subject Advisers**

Our national U3A has more than 70 subject advisers – you can find them in the Third Age Matters magazine that is posted to all members and on the Learn page of our national website at [www.u3a.org.uk](http://www.u3a.org.uk)

There is also a wealth of subject information on this website.

### **Beacon**

It is recommended that all groups use our Beacon database to maintain their list of group members and to contact them. Using Beacon means that you will always have the correct, up-to-date contact information and makes it very easy to add members, without having to type in all their details.

To ask for your group to be on Beacon, contact our Beacon Administrator at [beacon.thorleyu3a@gmail.com](mailto:beacon.thorleyu3a@gmail.com)

**IMPORTANT:** If you choose to contact your group members via your personal email, you **MUST NOT** share their email addresses with other members because this would breach data protection regulations. If you send emails from your personal email, you **MUST** put your addressees in the BCC field so they are concealed from other recipients.

## **Tell Members about Your Group**

- Ask for details about your group to be sent to all Thorley U3A members in our regular Update emails – send the information to [newsletter.thorleyu3a@gmail.com](mailto:newsletter.thorleyu3a@gmail.com)
- Write an entry for our website and for inclusion in our Groups List, including a description of what your group does, the time and place of meetings, any costs involved, phone number and email address of the person to contact. Send it to [chair.thorleyu3a@gmail.com](mailto:chair.thorleyu3a@gmail.com)
- Display your group on a table at our monthly meetings in the Barnabas Centre. To arrange this, email [groups.thorleyu3a@gmail.com](mailto:groups.thorleyu3a@gmail.com)

## **Finance**

The principle of U3A groups is to be self supporting and self financing. All costs must be borne by the group.

The maximum amount cash float that you should hold is £40.00. Anything more than this should be paid into the Thorley U3A bank account via the Treasurer.

Do not hold large amounts of cash at home. Monies collected should be paid to the Treasurer as soon as possible.

Group monies held by the Treasurer are ringfenced so they are solely for the use of the group which has paid them in. You can think of the money held in the Thorley U3A account as your group's 'bank account' because you can ask for cheques to be paid from it and you will receive a monthly statement of your group's balance.

There is a daily limit of £1,000 which can be paid out of the U3A's HSBC bank account via bank transfer. Amounts greater than this will need to be paid by cheque.

You should keep a record of your group's accounts. This does not need to be complicated – a simple list of money received and payments made will suffice. Please keep all relevant receipts and it is also good practice to give receipts to members who make payments to you.

It is acceptable for you to keep a small, separate float for tea/coffee and biscuits served during meetings. Normally group members are asked to pay about 30p for refreshments.

**IMPORTANT:** DO NOT use your own personal bank account for any group purposes.

## **Group Subs**

You may need to charge subs to group members to cover running costs, such as the hire of a venue, materials and equipment, or speakers.

If members decide that the group needs to make a regular subscription to cover costs then agree:

- The amount (it can always be changed)
- When it should be paid – weekly, monthly or annually. If members of the group pay annually, subscriptions made part of the way through the year can be proportional.

## **Paying funds to the Treasurer**

All cheques should be made payable to ‘Thorley U3A’ and should be given to the Treasurer accompanied by Form 10 detailing the cheques and cash. You can download Form 10 from the Events page of our website.

The cheques and/or cash together with Form 10 should be put into an envelope marked ‘For the Attention of the Treasurer’. Please also keep a copy of Form 10 for your own records.

If you need to claim expenses, please fill in Form 11, which again can be downloaded from the Events page of our website. If you need a cheque to be paid to someone else, please ask the Treasurer.

## **Equipment**

Your group may need to buy equipment. This should be paid for by the group membership. For the purpose of insurance it is the property of Thorley U3A, however, its use is solely for your group.

Please notify the Groups Co-ordinator at [groups.thorleyu3a@gmail.com](mailto:groups.thorleyu3a@gmail.com) of all the equipment you purchase so that it can be included in our Equipment List for insurance purchases.

A variety of equipment has also been purchased by Thorley U3A for the use of all of our membership. You can find full details of all equipment owned by us in the list on the Groups page of our website.

## **Paid Tutors**

The principle of the U3A movement is that members share their knowledge and skills with other members, so some U3As do not allow paid tutors. However, Thorley U3A has decided that in some circumstances paid tutors may be the best route for members to develop their interests.

That said, there are some issues that we need to consider in relation to paid tutors, including their tax position (we don’t want to become liable for PAYE!) and their public liability insurance. So if you are considering paying a tutor for your group, please ask for advice first.

**IMPORTANT:** No member of any U3A can be paid for their tuition services.

## **Paid Speakers**

You may pay one-off speakers to talk to your group as long as it is funded by your group. U3A members may not be paid for speaking, but it is acceptable to give them a small gift such as a bottle of wine or flowers.

## **Trips and Outings**

See the Guidelines for Organising a Trip which can be found on the Events Page of our website.

## **Insurance**

The Third Age Trust Insurance covers your group's equipment and money held by you, together with Public Liability and other risks. You can find the Cover Note on the Welcome page of our website.

If your group rents a hall, the hall management may want to see a copy of this Insurance Cover Note – you can download it from the website for them.

## **In Case of Emergency – ICE**

You will need to keep an updated list of contact details for all group members in case of emergency, particularly if you organise an outing, when you should take the list with you.

## **Sharing a Group with Another U3A**

If the group you have formed is quite small and you would like to have more members, you could open it to another U3A, such as Stansted, Bishop's Stortford, Sawbridgeworth or Harlow.

The committees of both U3As have to agree to this, so if you are considering a joint group, please ask for advice before proceeding.

***Guidelines updated April 2021***