

THORNBURY



THE UNIVERSITY OF THE THIRD AGE

Registered Charity number: 1080095

Guidelines for Group Leaders

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THORNBURY U3A

GUIDELINES FOR GROUP LEADERS

1. Introduction

Group leaders are important. A U3A is mainly a collection of interest groups and without group leaders it couldn't really exist. Being a leader always involves a certain, usually modest, amount of organisational and administrative work, but also quite a lot of satisfaction and enjoyment. These guidelines are intended to help you either take over the leadership of an existing group or start a new one (see Appendix 1). If you find they are not sufficient for your needs then don't hesitate to make use of the Useful Contacts listed at the end. And thank you for volunteering.

2. The Groups' Coordinator

The Groups' Coordinator is the first person a group leader should consult if he or she has any questions about group matters and is, in particular, the person who helps new groups to get started. The contact details for the Coordinator are given under Useful Contacts (see Section 18). The Coordinator will provide advice and help on group matters or will refer the leader to someone who can. In turn, the leader must keep the Coordinator informed of any changes made in the running of the group – changes of venue or meeting dates, for example. It is particularly important to let the Coordinator know if the leader plans to step down or if the group is being wound up.

3. Recruiting Members

Members can be recruited for your group by advertising in either our Newsletter or on our Website (see Section 11). Note that if a would-be member needs to be accompanied by a companion or carer in order to fully participate in the group's activities then this is allowed provided the U3A Committee is notified. The companion/carer need not be a U3A member but will still be covered by the Public and Products Liability Insurance taken out for all of the country's U3As by The Third Age Trust (see Section 16).

4. Finding somewhere to hold your Meetings

Small groups often hold their meetings in a member's home. If this is not convenient, or the group is too large, rooms or halls can be hired quite cheaply in and around Thornbury and the neighbouring villages. The Groups' Coordinator can provide advice on choosing a venue.

5. Running your Group: Practical Advice

You may run your group however you and the members please, but you may find the following advice – distilled from quite a lot of experience – useful.

- ◆ Don't feel you have to do everything yourself: the group members should be willing to pitch in and take some of the tasks off your hands – collecting fees, buying the tea and biscuits, arranging the chairs, running an individual meeting.
- ◆ Appoint a deputy leader. The only responsibility the deputy leader need have is to run the meeting on the odd occasion you cannot attend because of some pressing family matter, you are on holiday, or some such. This ensures you don't have to cancel a meeting at short notice. You can also, of course, allow the deputy leader to run a meeting occasionally under your guidance, thus training a possible successor.
- ◆ Engage the group members as much as possible in whatever activity is being practised. Most people like to take an active rather than a passive part in what is going on. This can be as simple as conducting a vigorous question and answer session at the end of a talk.
- ◆ Take a break or two during the year. Most groups meet once a month. If the meeting is late in the month, for example, then those groups will usually skip the December meeting to concentrate on enjoying the Christmas festivities. Also, quite a lot of groups take time off during the summer.
- ◆ Ensure that all members of your group are members of Thornbury U3A. This is an insurance requirement. The simplest way of doing this is to check membership cards of new members and check *all* membership cards following renewal in January or you can send a list of your members to the Groups' Coordinator who will check the membership database. The requirement can be relaxed if a non-member who is eligible to join us asks permission to attend one meeting of the group (but only one – insurance again) to find out what goes on and whether he or she wants to take it further.
- ◆ Don't feel that being a leader is an open-ended commitment – that you are there for ever. If you enjoy it so much that you want to go on indefinitely then that's fine, but, running a group for, say, three years is a splendid effort and well deserving of a break. And once you cease getting some enjoyment out of it, stop – *but please let us know of this in good time so we can try to find a replacement, and please be prepared to help us do this.*

6. Style and Organisation of Groups

The style and organisation of groups varies enormously depending on the type of activity. The leisure groups are straightforward with the leaders organising sessions and all members participating. However, within the groups with a specific subject focus, there is considerable variety. Some groups are taught by a single teacher - either the leader or another nominated member; some are self-taught following a published programme; some have a variety of internal and external speakers on a different topic each month, while yet others involve participation by all members equally - each taking the lead for a specific session.

The leader is free to choose which style best fits the subject and members of the group,

Many group leaders and members prepare their own materials for teaching or talks. Others borrow materials from within their group or from a range of other sources including The Third Age Trust Resource Centre (see Section 7).

7. The Third Age Trust: Information and Materials

Our parent organisation (TAT) is an excellent source of all kinds of information and material which you may find useful in your group activities. In particular it has a Resource Centre which produces lists of printed resources and DVD loan materials, covering a wide range of subjects. It publishes a magazine, Third Age Matters, four times a year which is distributed to each group free of charge and can be delivered to individuals for a small fee. TAT also has a Website which is well worth visiting (see Section 18).

8. Copying Documents

You may sometimes want to copy or scan copyrighted printed material for use in your group activities. The Third Age Trust, the U3A Headquarters organisation, pays the Copyright Licensing Agency for a “blanket” copyright licence which allows all U3As to do a reasonable amount of such copying/scanning whilst remaining within the law (see Appendix III).

9. Financial Matters

All groups have to be self-financing. These costs can vary widely between groups. The golden rule here is that the leader must not end up out of pocket. If the group meetings are held in a hired room then at the start of each meeting the leader should put out an attendance and contribution sheet so that each member can sign in and pay some fixed amount of money – one to two pounds is a common figure – to cover the hire of the room, the provision of any refreshments and the cost of any incidental expenses, such as postage, the leader may have incurred. To cover any start-up costs, the contributions can be increased for the first meeting or two and this explained to the members. In some circumstances, a one off start-up grant may be available: please ask the Groups’ Coordinator for further information. If a surplus is accumulated by the group *then this should be given back to the members in some way*. This is often done by occasionally having a meeting free of charge or arranging a social of some kind.

For a small group, with relatively limited expenses, the recording of the financial affairs need be nothing more than keeping the contribution sheets mentioned above. A group with rather more significant expenses needs to be a little more formal, because the members have a right to know where the money is going. Such a group usually appoints a treasurer, who keeps track of all of the monies and, once a year, provides a summary to the members for their approval. All groups should submit an annual summary to the U3A Treasurer for *his* approval and records. The U3A Treasurer has not specified a particular time of year when the accounts should be submitted as groups start their financial years at different times, however it is helpful if a regular annual submission is made- January, April or September are often the months chosen.

If a group treasurer chooses to open a bank account to help handle the group’s financial affairs, we ask him or her to inform the U3A Treasurer; the reason being that the U3A Committee members are also the U3A’s Trustees and are, technically, ultimately responsible for such accounts; so they need to be aware of how many of them there are.

10. Communicating with the Membership

We have three means of communicating with the membership, a Handbook, Newsletters, and a Website.

In January the Handbook for the year is issued and contains full details of all the interest groups and items that remain relevant throughout the year. The Newsletters are published in January, April, July and October and contain any group updates that leaders may feel are needed, plus items of current news. Leaders are expected to provide appropriate written inputs to the Newsletter Editor in time to meet the deadline given in the previous issue. The Editor's contact details are given under Useful Contacts (see Section 18).

Each group is allocated space on the Website to describe its activities, give a synopsis of meetings, display a photograph or two and recruit new members. This will not reach all the membership, as does the Newsletter, but about 85% of our members now have access to the Internet. It does have the great advantage that the members who check the News page regularly learn very quickly of anything new. The Website address and the contact details of the Website Manager are given under Useful Contacts. It is well worth using.

11. Meetings for Group Leaders

There are at present only two meetings a year which a group leader is either expected to attend or to provide a representative to attend in his or her place.

The first is the Annual General Meeting, usually held in November. This meeting is also a 'fair' for all of our group activities. Every group is allocated a table which should have a member in attendance to answer queries. The table or display boards can be used to present the group's activities in any way it chooses, and to recruit new members.

The second meeting is the annual Leaders' Lunch, usually held in September/October. This event is by way of a small thank you for the group leaders' efforts during the year. Leaders are served a good lunch, prepared by Thornbury U3A's own culinary team, drink a glass or two of excellent wine chosen by one of our wine groups, mingle with fellow leaders, talk shop, share experiences and buttonhole any passing committee member to raise any matter you feel needs to be addressed within the U3A.

12. Equipment: General

We own a useful selection of equipment, items of which can be borrowed by leaders to help them with their group activities. The equipment includes laptop computers, digital projectors, screens and public address (PA) systems. A full list of the equipment and the Custodians is given in Appendix IV. To borrow a piece of equipment, you simply contact the Custodian with the dates on which you need it. If the item is free on those dates you can arrange to pick it up. The equipment is fully insured and must only be used by, or under the supervision of, a U3A member who is competent in its use.

If you have difficulty in getting hold of a piece of equipment because it is heavily used then please raise the matter with the Equipment Coordinator (see Useful Contacts). He or she will pass the matter to the U3A Committee, probably with a recommendation to purchase an additional item.

All of our equipment is pretty easy to use. If you want to use an item of equipment but are not sure how, then please contact the Equipment Coordinator who will arrange for one of our experts to give the necessary tuition.

Members should be made aware that using their own equipment, such as a laptop, a digital projector or a camera, at U3A Group Meetings is at their own risk. U3A insurance will not cover it against accidental damage, so it is advisable for these members to check that their Household Insurance policy covers this risk.

Lots of our members also belong to other organisations and we occasionally get requests from such organisations to borrow an item of our equipment for a brief period. We allow this, and our insurance is not affected provided the equipment is used by, or under the supervision of, a U3A member who is competent in its use. We would normally charge a small fee for such a loan. Contact the Equipment Coordinator for details.

13. Health & Safety

A leader or deputy has to be aware of the Health & Safety (H&S) procedures of the venue in which the group meetings are held; in practice this usually means nothing more than making sure the group is made aware of where the fire exits are at the start of the meeting. In addition to this The Third Age Trust recommends that the leader or deputy know where the First Aid box is located and, more importantly, the postcode of the venue. If it is necessary to ring the emergency services, the first thing they will ask for is the postcode. For the same reason, the leaders of the walking, cycling and visits groups should be able to provide clear directions as to where they are.

A set of general notes on H&S is included (Appendix V). The H&S Officer can be consulted on any matters of concern.

14. Insurance

Whilst attending a U3A activity every member of every U3A in the country is covered by an insurance policy taken out by The Third Age Trust. The insurance is what is known as Public and Products Liability Insurance. It insures a U3A member against compensation claims arising from injury or damage to property suffered by a third party, or claims arising from the failure of a product, for which failure a U3A member is held to be legally liable.

The above is intended to be only a brief description of the insurance and is in no sense authoritative. The Third Age Trust has circulated to all U3As a set of Frequently Asked Questions (with answers) about the insurance, and a copy of this can be supplied to any interested group leader by the Treasurer (see Useful Contacts).

15. Accidents

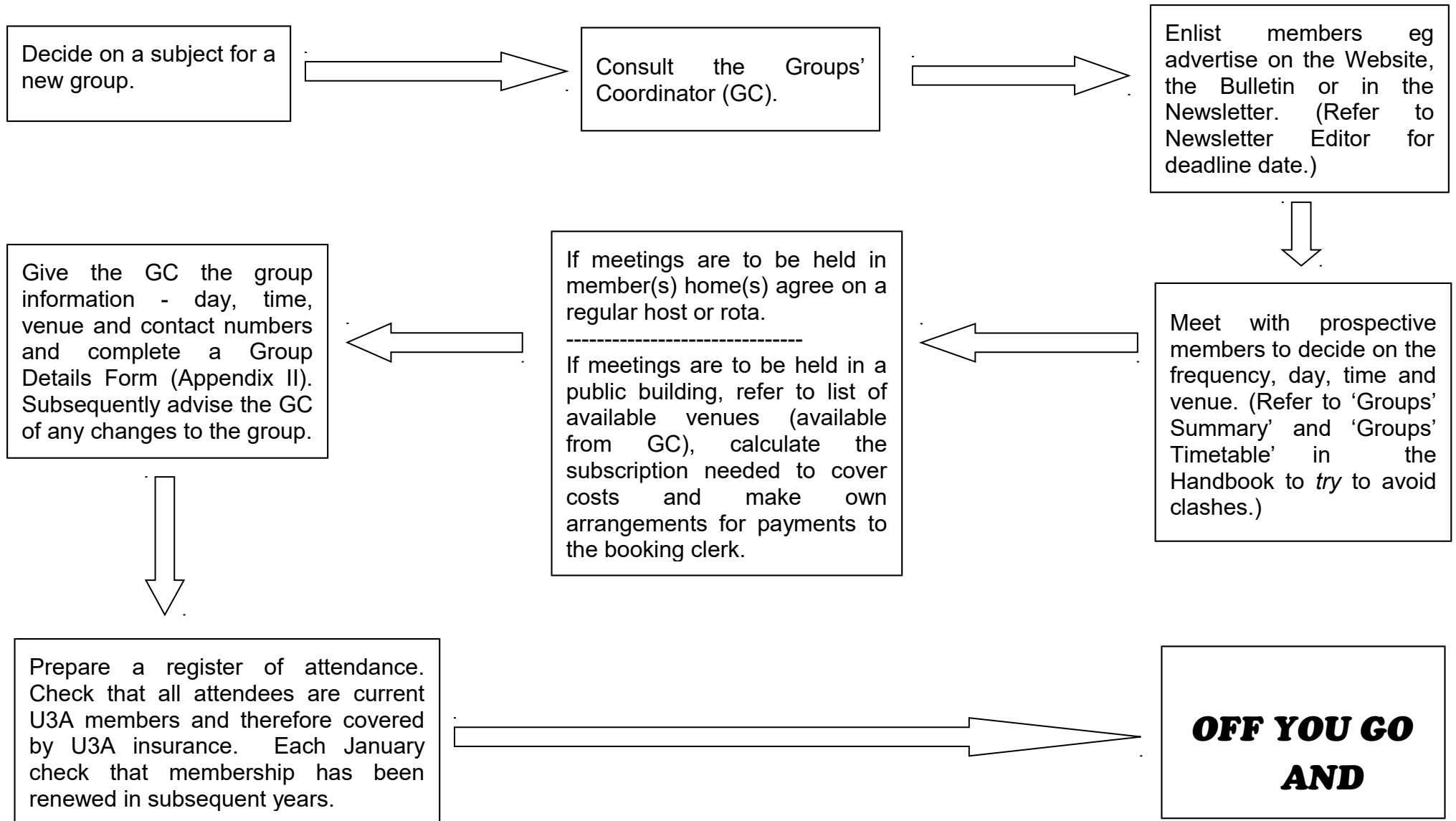
One consequence of the insurance referred to above is that, in the event of a member of your group suffering an accident whilst attending a U3A activity, he or she must complete an accident report form which you supply. A copy of the form is attached to these guidelines (Appendix VI). Completed forms should be returned to the Health and Safety Officer, whose contact details are given under Useful Contacts.

16. Useful Contacts:

Groups' Coordinator	Cynthia Black	412641	groupscoordinator@thornburyu3a.org.uk
Handbook Editor	Barbara Jones	414547	handbook@thornburyu3a.org.uk
Newsletter Editors	Carolyn Purdy & Barbara Jones	01453 521765	newsletter@thornburyu3a.org.uk
Treasurer	Quentin Killey	281372	treasurer@thornburyu3a.org.uk
Equipment Coordinator	Adrian Jones	417378	equipment@thornburyu3a.org.uk
Health & Safety Officer	Alan Heath	419053	healthandsafety@thornburyu3a.org.uk
Chairman	Alison Makepeace	415019	chairman@thornburyu3a.org.uk
Vice Chairman	Sue James	885452	vicechair@thornburyu3a.org.uk
Committee Secretary	Jackie Gitsham	858438	secretary@thornburyu3a.org.uk
Membership Secretary	Rosie Bailey	419977	membership@thornburyu3a.org.uk
Webmaster	Don Grundell	412896	webmaster@thornburyu3a.org.uk
Website Address			www.thornburyu3a.org.uk
The Third Age Trust Resource Centre Library		020 8315 0199	
The Third Age Trust Website Address			www.u3a.org.uk

Appendix I

HOW TO SET UP A NEW U3A GROUP



Appendix II
GROUP DETAILS FORM



1. GROUP NAME

2. E-MAIL CONTACT

3. NAME OF LEADER

TEL.

ADDRESS

4. NAME OF DEPUTY

TEL.

ADDRESS

5. VENUE FOR MEETINGS

6. DAY AND TIME OF MEETINGS

7. FREQUENCY

8. MAXIMUM SIZE OF GROUP

9. CURRENT SIZE

10. DO YOU HAVE A WAITING LIST?

IF YES, NUMBER ON LIST

11. DOES YOUR GROUP:

KEEP A REGISTER OF ATTENDANCE?

CHECK MEMBERSHIP CARDS EACH YEAR?

12. IS YOUR VENUE ACCESSIBLE TO MEMBERS WITH DISABILITY?

IF NO, PLEASE GIVE BRIEF DETAILS

Appendix III

COPYING DOCUMENTS: THE U3A CLA LICENCE

Introduction

Almost all educational activities these days involve copying documents of one kind or another. Strictly speaking, all such copying requires permission from the copyright holder and possible payment of a fee. To ease this problem for the country's U3As, The Third Age Trust, the national organisation for the Universities of the Third Age in the UK, has negotiated what is called a "blanket" copying licence with the Copyright Licensing Agency (CLA), the UK body which handles such matters. Within certain limitations, which are spelled out below, this licence allows all of the country's U3As to do the copying they need to do without seeking formal permission, and free of charge. The details of the CLA licence are given below exactly as distributed by the Third Age Trust to all U3As.

Do I need a Licence?

The Copyright, Designs and Patents Act (1988) together with the EU Copyright Directive (2003) provides copyright protection to all creators. All and any systematic single copying or multiple copying to spread education and learning is likely to require Rights Holder permission on each and every occasion. In practice this means that the Copier needs, on each occasion:

Permission in advance from the rights owner

Payment of whatever fee the rights owner wishes to charge: (no ceiling on expenditure)

Maintenance of proof of permission

Constant review and update of permissions

Awareness of rights owner contact details

Accounting with every rights owner

Fee negotiation with rights owner

What will the CLA Licence allow me to do?

The CLA "blanket" licence permits the blanket copying and scanning of copyrighted print material for educational purposes without having to approach the individual rights holder on each occasion. This CLA Licence offers the following rights:

Right to photocopy from any publication (book, journal or magazine) published in the UK (and other countries)

Extracts up to 5%, one chapter, or one article – whichever is the greater

Right to copy onto acetate or enlarge copies

Right to digitally copy (scan or retype) and to use these digital copies with digital whiteboards, within Virtual Learning Environments (VLEs), e-mail and so on

Right to store copies for one year

Copying entire works for visually-impaired students

One fee per annum for all licensed copying

No records to maintain

List of excluded categories

- ◆ *Works published outside the United Kingdom and the Mandating Territories*
- ◆ *Works published by US publishers that are not on the list of participating US Publishers*
- ◆ *Maps, charts or books of tables*
- ◆ *Printed music (including the words)*
- ◆ *Works specifically excluded by a special notice mentioning CLA, either on the work itself or by inclusion on the list below*
- ◆ *Tests or public examination papers whether published individually or in a collection*
- ◆ *All newspapers*
- ◆ *Privately owned documents issued for tuition purposes and limited to clientele who pay fees (except those published by the Open University or the National Extension College)*
- ◆ *Workbooks, work cards, or assignment sheets*
- ◆ *Industrial house journals*

Additional restrictions on scanning

Please note that CLA licences currently only permit the scanning of works originally published in the UK so that any works originally published outside the UK are excluded.

THORNBURY U3A EQUIPMENT AND CUSTODIANS May 2016

Equipment Item	Custodian
<ul style="list-style-type: none"> • Laptop 1 Packard Bell Butterfly M-EU-003 (Windows7, MSOffice 2007) 	Pam Dawe (614843)
<ul style="list-style-type: none"> • DVD Player 1 Toshiba SD3005KB (Multi region, upscaling) 	
<ul style="list-style-type: none"> • Projector 1 Epson EB-X02 (VGA input) 	
<ul style="list-style-type: none"> • Projector Stand folding portable 	
<ul style="list-style-type: none"> • Cinema Equipment (4 all round speakers, amplifier, DVD player, extension lead) 	
<ul style="list-style-type: none"> • Large Trolley Stand for projector and laptop 	
<ul style="list-style-type: none"> • Video Player 	
<ul style="list-style-type: none"> • 2m x 2m Screen 	Malcolm Tait (416770)
<ul style="list-style-type: none"> • Laptop 2 HP Pavilion G62-105SA (Windows7,MSOffice2007) 	Norman Taylor (418396)
<ul style="list-style-type: none"> • Projector 2 Sanyo PLC-XD2200 (2 x VGA inputs) 	
<ul style="list-style-type: none"> • Laptop 3 HP Pavilion G62-105SA (Windows 7 MSOffice 2007) 	Trevor Anderson (613279)
<ul style="list-style-type: none"> • Projector 3 Sanyo PLC-XD2200 (2 x VGA inputs) 	
<ul style="list-style-type: none"> • Computer Speakers Advent 2 x 5.5w 	
<ul style="list-style-type: none"> • Small PA System Aداstra D50 (two microphones) 	
<ul style="list-style-type: none"> • Laptop 4 HP 15 (Windows 10, MSOffice 2016) 	Terry Pashley (417090)
<ul style="list-style-type: none"> • Projector 4 Epson EB-X03 (VGA & HDMI Input) 	
<ul style="list-style-type: none"> • HDMI /VGA Interface Cable& Connectors- a selection 	
<ul style="list-style-type: none"> • Computer Speakers Labtec LCS-1060 	
<ul style="list-style-type: none"> • Projector 5 Epson EP-750 (VGA input) 	Rosie Bailey (419977)
<ul style="list-style-type: none"> • 1m x 1m Screen 	
<ul style="list-style-type: none"> • Music Centre (CD player, amplifier, speakers, extension leads) 	Jos Gregson (411652)
<ul style="list-style-type: none"> • 'Old' Music Centre (CD & cassette player + speakers) 	Bob Gray (885290)
<ul style="list-style-type: none"> • Bluetooth Wireless Speaker Inateck 10W (Supports Apple and Android Tablets) 	Ray Pioli (01173 706 403)
<ul style="list-style-type: none"> • Small PA System Pulse Megamouth Mk 3 	Alan Heath (419053)
<ul style="list-style-type: none"> • Loud Hailer 	Bill Gill (415339)
<ul style="list-style-type: none"> • Laminator 	John Ackland (418963)
<ul style="list-style-type: none"> • Portable CD/Cassette Player Philips AZ127 	Ian McDonald (413294)

FOR FURTHER INFORMATION AND HELP REGARDING BORROWING, CONTACT **Adrian Jones (417378)**

Appendix V

HEALTH & SAFETY

Health & Safety (H&S) is the responsibility of all of us in every walk of life and particularly when dealing with groups of people, but there is no intention of asking Group Leaders to adopt an overkill approach. The vast majority of the application of H&S legislation is common sense, but there are a few points which should be highlighted for special attention.

1. When hiring a venue it is incumbent upon the organiser, within the contract hire, to be aware of procedures in case of an emergency, the location of alarm points, fire extinguishers etc and the evacuation procedures, including the location of the Emergency Assembly Point. Note the postcode of the venue and the location of the First Aid box. Don't forget that, in the Armstrong Hall, wheelchair users can only go out of the back door.

2. All Group Leaders, Holiday Organisers and Visit Organisers owe a duty of care to their members and should endeavour to advise and respond to possible hazards. The Third Age Trust subject-advisors for Walking and Cycling have issued safety guidelines which should be complied with. The Sailing Group is linked with Thornbury Sailing Club and is affiliated to the Royal Yachting Association (RYA). It is obligated to comply with their safety protocols and guidelines.

3. Any groups that use electrical equipment involving cables being laid across floors should be aware of the potential tripping hazards. These should be mitigated by using mats to cover the cables or they should be taped to the floor, wherever possible.

4. Portable electrical equipment should only be used in accordance with the manufacturer's instructions for its intended purpose and in the environment for which it was designed and constructed. A visual inspection should be carried out on all electrical equipment and associated leads before each use. Extra care must be taken when working in hall kitchens. Do not bring any electrical kitchen equipment (eg. kettles) from home. The electrical equipment supplied will have been P.A.T. (Portable Appliance Test) tested. Before use please check that all electrical equipment has an in date P.A.T. tested label attached.

5. In theory "Risk Assessment Check Lists" should be made out by all leaders in respect of their activity, but it is considered that this would be overkill. The important thing is that all Leaders are aware of any potential hazards within their Group's activities and take reasonable steps to mitigate them.

6. Finally, if any personal accidents do occur, the Group Leaders should make sure that an Accident Report Form is made out and sent to the Health & Safety Officer. The Form (Appendix VI) follows these Notes and further copies can be obtained from the Secretary of the Thornbury U3A Committee (see Useful Contacts).

It is hoped that these Notes will be of assistance to Group Leaders and that they will act as an "aide memoire". For further help please contact the Health & Safety Officer (see Useful Contacts).

Appendix VI

ACCIDENT REPORT FORM: THORNBURY U3A

Name of injured party/address/telephone number:	
Name/address/telephone number of others involved:	
Date/Time of Accident:	Location:
Nature of Accident/Circumstances:	
Injury Details/Property Damage:	
Name/address/telephone number of person causing injury/damage:	
Witnessed by: Address: Telephone number:	
Action taken:	
Was any specialised assistance required at the scene? If so, give details:	
Was medical advice sought? If so, give details:	

Name of Group Leader.....

Telephone number.....

Signed.....(injured party) Signed.....(group leader)

Date