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HANDBOOK FOR GROUP CONVENERS

Thank you for agreeing to organise an interest group. We are sure you will find it very rewarding, however, it might seem a bit daunting initially, so we have prepared this handbook which is intended to provide you with advice and support. Please do not be put off by the handbook – it is intended to help!

Introduction

This handbook refers to Torfaen u3a Only.

The title 'Convener' is used in this guide as it is the one most commonly used by members. However, people who help to create interest groups are known by many names. You might be a group leader, facilitator, convener, manager, organiser.

It is often said that interest groups are the life blood of the u3a and each group will develop its own structure. However, it is important that your group follows the u3a ethos of shared participation and self-help learning. 'The teachers learn, and the learners teach.' The result then will be not only an increase in knowledge, but a supportive and friendly atmosphere which enables everyone to participate.

Torfaen u3a has a group coordinator

XXXXX

who is there to help and advise you. Also

Judy Dickinson (tel 01495 981373 jwddee@gmail.com)

and

XXXXXX

also assist in this role and will help you when they can.

Occasionally they will call a conveners' meeting so that we can all get together and share our problems and triumphs.

The u3a ethos is based on three principles:

a) The Third Age Principle:

- i) Membership of a u3a is open to all in their third age which is defined as anyone no longer in full time employment.
- ii) Members promote the values of lifelong learning and the positive attributes of belonging to a u3a.
- iii) Members should do all they can to ensure that people wanting to join a u3a can do so.

b) Self-help learning principle:

- i) Members form interest groups covering as wide a range of topics and activities as they desire.
- ii) Learning is by the members, for the members.
- iii) No qualifications are sought or offered. Learning is for its own sake, with enjoyment being the prime motive, not qualifications or awards.

- iv) There is no distinction between the learners and the teachers. They are all u3a members.
- c) The Mutual Aid principle:
 - i) Each u3a is a mutual aid organisation, operationally independent but a member of the Third Age Trust, which requires adherence to the u3a movement.
 - ii) No payments are made to members for services to any u3a.
 - iii) Each u3a is self-funded with membership subscriptions kept as low as possible.
 - iv) Outside financial assistance should only be sought if it does not imperil the integrity of the u3a and must be approved through the Committee.

The first steps to forming a new group

- a) Agree the development of your group with the Groups Coordinator/u3a Committee
- b) Consider what interest there might be in the subject perhaps by some informal soundings.
- c) Consider what the aims of the group are – what are you hoping to learn/achieve/share by offering the group?
- d) Is there an existing national subject adviser who can support with ideas for the development of the group – check on the national website **www.u3a.org.uk**
- e) An alternative to subject advisors might be to contact neighbouring u3a s to see if they have a similar subject group and then talk to the group leader to get some first-hand knowledge. It may be that you could sit in on a group meeting.
- f) Generate interest by promoting your group using as many different methods as possible. This could include, promotion via existing groups, via the u3a newsletter, via Kath's Torfaen u3a group Facebook page www.facebook.com/groups/2398795360345526 , addressing the monthly meeting, talking to members in groups that you attend, or developing publicity in the form of a flyer, or poster. The more methods you use, the more successful you are likely to be.
- g) Would the activities benefit from having a risk assessment completed for the group? You should consider whether there are any risks that might occur as a result of the group's activities and, if you identify any, talk to the Groups Coordinator who will advise you on risk assessment procedures. If you're unsure or want further advice speak with your Groups Coordinator, Committee or National Office.
- h) Identify what you want to achieve from your preliminary meeting.
- i) Organise your preliminary meeting and invite people to attend.

The preliminary meeting

Recommended steps to take at the preliminary meeting:

- a) Introduce yourself and the purpose of the group as you see it
- b) Ask about the skills within the group
- c) Agree the tasks that need doing to run the group and who is willing to support these e.g. who is willing to help with the programme, or keep the register/ administer Beacon
- d) Agree, if relevant, the level that the group will be aimed at – beginners, improvers, advanced
- e) Agree how the group will work – discussion, instruction, presentation, etc.
- f) Agree how, when and where the group will run. If online, check that possible members can run the proposed platform and arrange help as needed. If a physical meeting is proposed complete a venue check list.(venue assessment will need to be revisited regularly (annually or after an incident, or substantial change.- see form)
- g) Identify any accessibility needs that group members may have. Refer to the u3a Plus website for advice and guidance www.plus.u3a.org.uk
- h) Agree the costs for running the group and what members will pay? If it is to be funded by your committee agree a budget with them. If needed Torfaen u3a will cover the fee for the preliminary meeting.
- i) Confirm with your u3a Treasurer how monies will be handled and reported.
- j) Discuss how group members will communicate with each other bearing in mind data protection concerns. Agree how the group will contact each other – email, phone, text, WhatsApp.
- k) Agree some ground rules e.g.
- l) Turn off mobile phones unless strictly necessary and agreed with coordinator.
- m) Listen to each other.
- n) When using online meetings instruct the group about online etiquette. Turning off microphones if someone is giving an extended speech and indicating by hand signals when you want to speak.
- o) Listen to each other
- p) Allow others to speak.
- q) Let someone know if you are unable to attend.
- r) Agree to disagree amicably and be respectful to other group members.
- s) Every contribution matters.
- t) Have patience with and encourage those who are slower to learn.
- u) Feedback what was agreed at the preliminary meeting to your Groups Coordinator to finalise arrangements.

Participative Learning and Learning Styles

'Tell me and I forget. Teach me and I remember. Involve me and I learn.' Benjamin Franklin

'Every accomplishment starts with the decision to try'. Anon

The value of the u3a style of learning is that everyone can contribute and by doing so will gain a feeling of self-worth and integration. We all learn in different ways. Variation in content, method and style can make the learning experience more vibrant and appealing. Many of us will have particular skills, but most of us will use a combination of the following:

- a) Visual: using pictures, diagrams, images and spatial understanding.
- b) Verbal: using words – both spoken and written.
- c) Auditory: using sounds, rhythm, music, spoken presentations.
- d) Physical/kinaesthetic: using hands, body, senses and acting things out.
- e) Logical/Mathematical: using logic, systems, sequences, data, statistics.
- f) Social: learning as part of a group, sharing experiences and explaining your understanding to others.
- g) Solitary: studying on your own.
- h) Technology: - Using modern technologies to research, illustrate and communicate.
- i) Consider the following options:
 - i) A visiting speaker: A one-off visiting paid speaker, non-paid tutor or someone from another interest group or u3a. (Can include presentation over Zoom)
 - ii) Group member presentations: A short presentation by a member of the group or a member leading the meeting on a specific topic. (Can include presentation over Zoom)
 - iii) Discussion groups: Some activities will lead to discussion e.g. 'What the papers say', 'Which way does water go down the plug hole – and why?' (Can take place over Zoom)
 - iv) Project based: A project chosen by the members. Each person (or pair) allocated an area of research which they bring to the group. This can be a good way to learn new technology.
 - v) Practical work: This might lean towards specific subjects such as science, craft, photography, creative writing, storytelling.
 - vi) Drama: Create a short sketch. Provide some entertainment for your monthly meeting.
 - vii) Themes: Have an event or presentation linked to a specific topic.
 - viii) Liaise with a school or community group: e.g. local history presentation, art exhibition, debate.
 - ix) Liaise with other organisations: Museums, Universities, Libraries. Very useful for Shared Learning Projects. Other local u3a s may have groups that would be interested or can provide assistance.

- x) **Shared Learning Projects:** These are opportunities to work on short term projects with other u3as or outside organisations. They usually involve research and have a definite outcome.
- xi) **Study days and workshops:** Plan one for your own members or as part of a local network. e.g., Family History Day, Language Day, Storytelling workshop, debate, quiz, music.
- xii) **Online learning:** MOOCS (Massive Open Online Courses), YouTube 'How to' videos, Future Learn.

Help and Support

- a) **Educational resources:** National Office offers access to a range of educational resources. These can be booked via the national website if you create an account. For DVD loans, the only cost is return postage.
- b) **Sources and Sources Online:** Sources is the educational publication and online platform where the work of interest groups is showcased. Sources online can be accessed via the national website or via www.sources.u3a.org.uk
- c) **Subject Advisers:** Trust volunteers with specialist knowledge in a wide range of topics. Contact details are available on the national website and in Third Age Matters.
- d) **External organisations:** Museums, libraries, schools, universities.
- e) **u3a publications:** Check the national website for the latest publications.
- f) **Networks, regions, neighbouring u3as:** allow you to draw on experience from within the movement
- g) **Regional Trustee:** will provide an overview of the region and a link to National Office
- h) **National Office:** the staff team are available Monday to Friday to offer support
- i) **Research Database:** contains up to date information regarding research projects. The database is available under the resources tab of the website.
- j) **Other learning opportunities**
 - i) Enquiry-led Learning/ the Research Network : Shared Learning Projects and Research links with universities and within u3as; contacts available from the national website.
 - ii) National and Regional Summer Schools
 - iii) Events facilitated by National Office
 - iv) National, Regional and Network Workshops and study days.
 - v) Day trips (See checklist at back)

Sharing Information

It can also be good to share information about your group

- k) On our group's website
- l) In a newsletter
- m) As a display/presentation at the monthly meeting
- n) Via Sources or Sources Online
- o) On social media such as Twitter or Facebook

Policies and Procedures

Your committee and/or Groups Coordinator will advise you of the u3a Insurance arrangements, policies and procedures that you need to be aware of. These will include matters concerning:

- a) Finance
- b) Data Protection
- c) Safeguarding
- d) Venues need to be checked periodically.
- e) If you want to run a workshop consult your group coordinator for information and risk assessment.
- f) Equality, Diversity and Inclusion
- g) Accessibility
- h) Complaints
- i) Incident reporting

It is recommended that you also have a look at the advice section of the national website where a range of useful information can be found. www.u3a.org.uk It is also a good idea to sign up to the newsletter that is sent out by the Trust on a monthly basis as it will keep you up to date with wider u3a news. You can sign up to the newsletter via the national website.

Copyright

The Trust holds a licence to copy some materials for educational use within groups. If you are going to be using copyright material in any form, for example, printed, audio or pictures, please check with the advice section of the national website for further details on copyright.

Problem solving

Sometimes issues can arise within a group that disrupt the smooth running and spoil the enjoyment for everyone. Don't leave a problem too long before trying to resolve it. Talk to your Group Coordinator if you are unsure how to resolve the problem or just want someone to explore options with. If this is not successful consult the Committee with your group coordinator. As a last resort you can also ring National Office.

Issues between group members

Where there is potential for friction it is advisable to begin by bringing it into the open. Either you or another person could try to facilitate a discussion either with the members concerned or with the whole group, but it is important that the facilitator remains neutral and non-judgemental. If you cannot reach a resolution informally speak to your Group Coordinator or a member your committee. If a situation does not resolve and becomes acrimonious your committee can consult the advice on disciplinary procedure provided by the Trust. There are also Trust volunteers trained to support with resolving disputes.

Accidents and Incidents

- a) Report all accidents and incidents to your committee as soon as possible and complete an accident form. It is as well to have an accurate record in case of future problems relating to the incident. Remember that the Third Age Trust provides insurance for groups activities.
- b) For some groups you may consider it necessary to ask members to hold or provide emergency contact details. To request contact details, you need to complete a legitimate interest assessment – please refer to the National Office website for a suitable template.
- c) Make a note of any changes in your venue or group and consider how they may affect your group.
- d) For some groups you may consider it necessary to ask members to hold or provide emergency contact details. To request contact details, you need to complete a legitimate interest assessment – please refer to the National Office website for a suitable template.

Logbook

This is for you to develop in whatever way you feel would be most helpful.

- e) It should include:
 - i) Contacts
 - ii) Registers
 - iii) Emergency contact details of group members. (Members can refuse to give this.)
- f) It could include:
 - i) Statement of the group's aims
 - ii) Venue, timing, costs
 - iii) Day trip information where relevant.
 - iv) Accounts where relevant
 - v) Materials and support available
 - vi) Local information

Beacon

You may choose to use this system to facilitate your group and its finances.

Beacon is a National software application sponsored by The Third Age Trust and purchased by Torfaen u3a. It contains details of members, the groups they belong to, facilities to contact members of your group and ability to record and manage finances.

Contact the System Administrator Anthea Wellington on 01633862650 or anthea_wellington@hotmail.com for details, training, assistance and a password.

vii) Forms

We have included these forms which may help you in certain circumstances. You can also just write a dated report in your log book but the forms can sometimes help you gather the relevant information.

Forms for many other types of activity are available from the national website page <https://www.u3a.org.uk/advice/risk-assessments>

(ADD RISK ASSESSMENT/COVID)

Incident Report Form : Torfaen u3a

Please note that this form is to be filled in by - a member of the committee, a groups convenor or a property owner (please under line as appropriate) A copy should be retained on file by torfean u3a committee in the case of a claim and for a three year period even if a claim seems unlikely.

Incident report form

Please note that this form is to be filled in by a member of the committee, a group convenor, or the property owner and should be retained on file by the U3A committee in case of a claim and for a period of three years even if a claim appears unlikely.

1 Your details

U3A	
Name	
Position	
Email	
Telephone	
Address	
Postcode	

2 Incident details

Date of incident	
Time of incident	
Where did the incident occur?	
Please state the reason for the injured person or damaged property being there	
Please describe the circumstances of the incident <i>Attach a sketch or photograph(s) if possible</i>	

3 Particulars of person(s) involved in the incident (continue on a blank page if necessary)

Name	Email
------	-------

Address	
Postcode	Telephone
Was he/she a member of your U3A on the date of the incident?	
Name	Email
Address	
Postcode	Telephone
Was he/she a member of your U3A on the date of the incident?	

Sections 4 and 5 are to be completed for any incident involving injury.

4 Particulars of the injured person(s) (continue on a blank page if necessary)

Name	Email
Address	
Postcode	Telephone
Was he/she a member of your U3A on the date of the incident?	
Name	Email
Address	
Postcode	Telephone
Was he/she a member of your U3A on the date of the incident?	

5 Details of injury

Describe the injury/injuries
Immediate action taken
Treatment at the scene
Admission to hospital
Ongoing medical treatment

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Section 6 is to be completed for any incident involving damage to property

6 Details of damaged property

Describe damage caused	
Estimated cost of repair or replacement	
Name of owner of damaged property	
Email	Telephone
Address	
Postcode	

The remaining sections are to be completed for all incidents

7 Name and contact details of any witnesses to the incident

8 Declaration

I/We declare that to the best of my/our knowledge and belief all the foregoing particulars are true and correct in all respects.	
Signed	Dated

Venue Risk Assessment Checklist

U3a Name	
Interest Group	
Date	Location/Postcode
Description of Activity	

Hazard		Yes	No	N/A	Comments
1	Is the access suitable for the group attending the activity especially anybody with limited mobility?				
2	Is wheelchair access adequate?				
3	Is the area free from obstructions & trip hazards?				
4	Are there adequate means of escape in an emergency?				
5	Are there appropriate direction signs to aid escape?				
6	Is there a Fire Alarm?				
7	Is there Emergency Lighting?				
8	Is there a designated assembly point? Where is it?				
9	Is there an emergency procedure for the building? Do you have a copy?				
10	Is seating always laid out?				
	Is it a U3A responsibility before and after the activity to lay out seating				
11	Is there a kitchen?				
	Is the kitchen adequate and hygienic?				
	Are food safe cleaning materials available?				
	Has the kettle been visually safety checked?				
12	Are the toilet facilities adequate & accessible?				
13	Is equipment being brought to the venue?				
	Has it been checked?				
14	Is there a First Aid box and if so where is it located?				
15	Does it have a sound system with an induction loop?				
16	Other (define)				

Additional information:

Exceptional Circumstances

There may be reasons why additional conditions may have to be taken into consideration when completing this risk assessment.

When completing a risk assessment in exceptional circumstances you need to consider how this will impact on the activity, what additional measures or changes you will need to make for each identified hazard in order to reduce risks involved in running the activity. These changes will need to be incorporated into the assessment of how hazards can be reduced or avoided to respond appropriately to the exceptional circumstances you are facing.

Notes for exceptional circumstances:

Signed

Dated

Venue Checklist (Day of Use)

U3A Name	
Interest Group	
Date	Location/Postcode
Description of Activity	

Check		Yes (✓)
1	Emergency Exits unobstructed	
2	Emergency Exits unlocked	
3	Fire Extinguishers in place	
4	Toilet facilities open, clean, paper available etc	
5	Walkways free from trip hazards	
6	Kitchen facilities accessible & clean	
7	Kettle leads in good condition, free from wear and fraying, plug securely attached	
8	Refreshment items available	
9	First Aid equipment accessible	
10	Safety Briefing given <ul style="list-style-type: none"> a. Emergency exits b. Assembly point c. What to do if fire discovered d. What to do if the alarm sounds e. Accident / injury reporting f. Toilet and washing facility location 	
11	Other (specify)	
12	Other (specify)	

Notes

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Notes for exceptional circumstances:

Signed

Dated