



THE UNIVERSITY OF THE THIRD AGE

Study Group Leaders Guide

Registered Charity No. 1123484

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2.0 Introduction

The Executive Committee (EC) appreciates the work done by Study Group Leaders (SGLs). Without its volunteers, Watford Park U3A (WPU3A) could not continue.

This document contains ideas and advice for starting and running a Study Group (SG). Much if it is for guidance only. However, WPU3A is a registered educational charity and to maintain that status there are procedures which must be followed, particularly in the areas of finance and data protection. In most cases, these rules are negotiated through the Third Age Trust (TAT).

Many of the documents referred to in this guide, including the WPU3A Constitution and the WPU3A Policies and Regulations are available on the website in the 'Links' section on the Welcome Page. The address for the website is www.u3asites.org.uk/watfordpark.

Any queries regarding the content of this guide should, in the first instance, be addressed to the Study Group Co-ordinator.

3.0 Starting a new group

- If one or more members have a suggestion for a new group the Study Group Co-ordinator (SGC) must be informed.
- The SGC will instigate the start of a new group by announcing it in the newsletter and at the main meeting, also by displaying a 'sign up' sheet at the monthly meeting to attract potential members for the group. The SGC will offer advice and practical assistance where necessary.
- An initial meeting will be set up by the SGC to discuss the way forward once a number of people are interested in the group. This will include determining day, date, time and place where the group will meet.
- Groups can vary in size and have started very successfully with just 4-6 members. Many take place in members' homes and members may take turns to host the meetings. In selecting a location for the meeting, consideration should be given to the size of the group, access to the venue and parking restrictions.
- In deciding the day, date and time for meetings, consideration will be given to the availability of the interested members and to the schedule of other meetings operated by WPU3A. A list of these and the day and time they occur can be found on the website in the 'Groups' section.
- Some groups may need to rent premises. The SGC has a list of local venues, some of which are free. This list is updated by the EC and is always obtainable from the Study Group Co-ordinator. It is also included in the 'Links' section of the 'Groups' page of the website.
- Groups vary in their format and style. Some will have an enthusiastic SGL who has some knowledge of the subject. Others operate on the basis that members take turns in organising meetings, perhaps researching a topic for the group. However some groups require minimal organisation.

- Finding a leader is an important aspect of the set-up meeting. Usually someone will emerge, especially if another member is willing to assist, providing a safety net for the Study Group Leader and to take on some of the responsibilities. Sometimes an assistant will take responsibility for financial matters, or keep a membership list and register of attendees. Without a Study Group Leader there can be no study group.
- If the group needs to buy any equipment, a small start up or capital purchase grant may be available from WPU3A funds. The SGC will be able to advise on this matter.
- The philosophy of the U3A is "Those who Learn shall also Teach and those who Teach shall also Learn". Everybody can contribute something for the benefit of themselves and others. In exceptional circumstances a paid tutor may be considered by the EC for the group. (Refer to WPU3A Regulations on the website for more on paid tutors).
- It is not permissible to pay a member of this or any other U3A for tutoring or speaking at a meeting.
- All new groups and changes to the parameters of any group must be authorised by the EC, and the Study Group Leaders details given to the Study Group Coordinator (SGC).
- There MUST be an email contact for each group. If the SGL does not have and use an email address another member of the group must be chosen.

4.0 Operating a group

4.1 General

- The principal role of the Study Group Leader (SGL) is to guide members through a programme of studies or activities. An Assistant Leader provides support though in many groups everyone takes an active part leaving the SGL to coordinate. Larger groups may decide to have a small committee and hold planning meetings.
- **Delegate where you can:** involvement makes for more interested members. Try to be aware of people's needs such as hearing problems, poor eyesight, mobility needs etc.
- If you need advice, contact the Study Group Co-ordinator.
- Whatever style the group follows, ensure that meetings have structure and that someone is responsible for leading the discussion or members will become disillusioned and drift away.
- We are an all-inclusive charity where no discrimination is permitted.
- **Membership Lists/Cards:** When new members join a Group, please check they are fully paid-up members of WPU3A, as there are insurance considerations. A list of study group members and their contact details should be maintained by the SGL. For information on retaining members' personal information, see section 7 below.

- **Register of Attendance and Waiting Lists:** A register is good practice enabling you to check attendance. Ask your members to tell you if they are going to be absent for any prolonged period of time. Check attendance regularly and try to admit new members into your group where possible. Generally if members have been unable to attend for a while, they will agree to their place being offered to someone on the waiting list.

Rules and Guidelines: It is advisable to have some rules for the group and to have a document which can act as both an introduction to the group and a summary of what is required of members. By joining the SG members must agree to and abide by the rules. Appendix 3 shows a template for such a document which can be customised for your group.

- **Review of Rules and Guidelines:** It is good practice to have regular reviews (frequency will vary depending upon how often the group meets) to discuss what has worked well, what not so well and whether the rules need to change.

- **Members of Other U3As:** Generally all members of Study Groups should be fully paid-up members of WPU3A. Study Group membership may be offered to a member of another U3A only if it is an official Joint Study Group. If you wish to open your group to other U3As, you must do this through the Study Group Coordinator. (Refer to Appendix 8 for a definitive guide to Joint Study Groups)

- **Visitors to Meetings:** Prospective WPU3A members may attend a Study Group meeting before joining (See WPU3A Regulations). After two attendances as visitors they must either join WPU3A or stop coming to the group meetings. These two attendances could be two visits to one study group, or one study group meeting and a monthly meeting but no more than two in total.

- **Ground Rules for Discussions:** Try to ensure that everyone has a chance to speak and try not to let one or two members dominate meetings or others will become frustrated. Agree on confidentiality as appropriate.

- **Communication:** Sometimes, especially with larger groups, it is helpful to use the Newsletter to pass information to members. Keep your items clear and concise. Space is at a premium and there are many groups who may want to inform members of activities. Let the Editor have information about dates and other relevant details in good time for publication. The email address is wpu3anewsletter@talktalk.net The deadline copy date is usually 10th of the month but check the previous edition for warning of changes. The editor reserves the right to shorten or amend any item for publication.

Reports: If your group has anything to report, a short article in the Newsletter or an entry in the group's web page is a good way to communicate. This is especially relevant for visits and special events organised by the group. The article can be accompanied by photographs but to comply with Data Protection rules, if those photographs show any people they should be sent to the newsletter editor or web master with a note to confirm that those pictured have given their permission for the photographs to be published. For further details see section 8.0 below, dealing with Data Protection. Photographs must always be submitted electronically in JPEG format.

- **Web Site:** Study Group Leaders should organise a page on the WPU3A web site giving information about their group and keep this up-to-date on a regular basis. Further information may be obtained from the Study Group Co-ordinator.
- **Programme:** Keep the interest of the group maintained by involving and encouraging members to participate. Aims should be defined and a basic structure put in place. Activities may be varied, for example, following a course, inviting speakers to group meetings, showing video/DVDs, visits, both local and further afield, group discussions, use of Internet and Third Age Trust material etc. Most importantly, do give the opportunity for all members to review what has been achieved and to plan the next step.
- **Membership numbers:** You will need to put a limit on your group's membership. When this is reached and more people apply to join, you must start a waiting list. When there are three people on the waiting list you should consider moving to a larger meeting room. If this is not feasible, pass the names on to the Study Group Coordinator who will contact them with a view to starting a new group.
- **Review of Rules and Guidelines:** It is good practice to have regular reviews (frequency will vary depending upon how often the group meets) to discuss what has worked well, what not so well and whether the rules need to change.

4.2 Resources

There are a variety of resources available from the Third Age Trust (TAT) and on the internet (www.u3a.org.uk).

- The U3A National Website: <http://www.u3a.org.uk>

This contains information about the U3A, access to the Resources Centre (including the DVD library), Publications, forthcoming events and Subject Advice. Follow the online instructions for access to the Members Area of the website. You will need to register and set up log in details.

- U3A Resources Centre: "resource.centre@u3a.org.uk" or Tel: 020 8466 6139

The U3A Resources Centre has a huge variety of resources in the form of DVDs and publications. See the national website for details of what is available and how to borrow items.

- 'Third Age Matters' magazine and 'Sources' magazine

Third Age Matters' magazine is published five times per year by The Third Age Trust (TAT). Subscriptions can be set up on the TAT website. A text only version is available online.

Sources' is a TAT educational bulletin published three times a year, full of useful information for Study Group Leaders. This is also available online. A particular theme is highlighted in each issue, and back issues are available.

- WPU3A members need to contact the Membership Secretary if they want copies of these magazines. There is no charge for Study Group Leaders.

- Start-up Leaflets

These are available for new Groups and cover many different subject areas. They are available from the TAT website and can be downloaded online.

- TAT National Co-ordinators

These are specialists in many different subjects. Contact details appear in 'Third Age Matters' magazine and on the website. You can contact these subject specialists for help and advice via the website.

4.3 Safety of Group Members

- The safety of members is an important aspect of running a study group. There are more details in section 9.0 below, but there are some simple actions to be considered.

- The postcode of the venue where your meeting takes place is needed if Emergency Services have to be called out. Please record this on your membership register so it is readily available. Whatever your activity and wherever it takes place, it is wise to do a simple risk assessment for health and safety. Fire escapes should be pointed out to members if you meet in a hall and do ensure they are operable and free from obstruction.

- Relevant personal health conditions should be disclosed to the Study Group Leader at the discretion of each individual member. This is possibly more relevant for trips, especially those outside the UK. A sample (optional) questionnaire is included as Appendix 2.

- ICE (in case of emergency) cards should be carried at all times on trips, walks or visits. These may be obtained from the Membership Secretary.

5.0 Trips and Visits

5.1 Trips

- If you are organising a trip or a group visit for the first time you are strongly recommended to discuss your plans with someone who has previous experience. Please ask the Study Group Co-ordinator for names of those who may be able to help you.

- When selecting a date for a trip, liaise with other trip organisers to avoid a clash of dates and to spread events as evenly as possible. Also avoid the Executive Committee meeting dates (first Tuesday) and monthly meeting dates.

- Once arrangements are made, contact the Newsletter editor with the details so that they can be included in the Events Calendar. Check the published details carefully and advise any corrections for inclusion in the next Newsletter.

- SGLs can assume that public venues are safe but if a reconnaissance visit is required to check on access and hazards, the SGL can be reimbursed but the cost of such a visit must be recovered from the charges set for the trip.

- Ensure that everyone is a paid up member of WPU3A or that they fulfil the criteria needed to come as a visitor. If in doubt check with the Membership Secretary.
- Ensure that the venue has up to date information, is open on the date selected and whether they give group discounts
- You may need a deputy for the day
- Work out the amount of time needed for travel including allowance for delays and possibly a comfort stop of 20 minutes if over two hours journey time
 - The cost must be established in advance and allow for all expenditure including incidentals such as photocopying of information, guidebooks or telephone charges. Trips should be designed to break even. If a trip makes a profit, that surplus may be used to subsidise future trips. Trips should carry a low financial risk. For instance, SGLs should not buy theatre tickets before money is collected from members.
- Coach costs must include a gratuity for the driver and allow for the possibility of only an 80% uptake.
- Venue costs may differ if you are visiting National Trust properties and some of your members are NT members.
- If it is a car sharing trip then an appropriate cost to the driver should be shared by all passengers. (Current guidelines are 45p per mile for round trip journeys up to 80 miles, 25p per mile for longer journeys. The Treasurer can advise on current suggested rates).
 - Recording payment is of the utmost importance. All payment must be by cheque. It is also a good idea to issue reminder slips with date and time.
 - Waiting Lists and empty seats. Keep a list and advise a person when their name is near the top to ensure the date is saved. Advertise empty seats as soon as possible in the Newsletter or at a main meeting.
- On the rare occasion that numbers are low contact the Study Group Coordinator who can offer places to other U3As.
- Keep everyone informed of the itinerary on the day by a handout and/or the use of the coach microphone.
- Tourist Information Offices can often supply street maps, lists of places to visit and to eat which can be photocopied or passed around a coach.
- Guides at venues and Blue Badge guides can be used but may be expensive.
- Ensure all members carry their ICE cards mentioned in section 4.3 above.

- If members are unable to attend a visit for which they have paid, their place should be passed on to a member on the waiting list. This person can then write a cheque to WPU3A for the tickets. If there is no waiting list, a refund cheque can be issued by the Treasurer only if the trip has a surplus. The decision to offer a refund is at the discretion of the SGL in consultation with the Treasurer.

5.2 Trips Involving an Overnight Stay

- The Trustees of the Watford Park U3A have a duty of care for members, including protection of Study Group Leaders organising study tours and visits involving overnight stays. The situation pertaining to Package Holidays is covered by Government legislation. It is complex and there is little relevant case law. Therefore the advice is that Study Group Leaders should use a Travel Agent rather than leave themselves potentially open to a lawsuit. In view of this, the EC must ratify all visits involving an overnight stay. Please therefore give your proposals along with an income and expenditure budget to the Study Group Co-ordinator **before** making firm arrangements.

5.3 Trips to Europe or further afield

- Trips to Europe and farther afield need special consideration. The EC **must** be consulted before any plans are made.

5.4 Walking Groups and other "activity" groups

- Walking groups and other activity groups should ensure that members are aware that they partake at their own risk. Leaders of such groups have a duty of care (see Insurance section) so are advised to assess potential hazards (for example to try out walks in advance and have a back marker). Ensure that members are suitably clothed and shod for the activity. This is usually discussed when a member joins the group and can be done quite informally.
- Walking group leaders should consider very carefully whether to allow members to bring dogs with them and must seek the permission of the other walkers. Guide dogs are an exception, being considered to be working and under control. Children cannot take part in U3A walking groups for insurance reasons.
- Appendix 5 contains a disclaimer form for walking groups which the SGL can use if they wish. Other activity groups could modify this form for their own use if they so wish.
- More information on walking and similar groups is given in Appendix 4, including a useful checklist.

5.5 Risk Assessment

A Risk Assessment is a process conducted to predict and therefore avoid problems in any endeavour. It consists of looking at every step of a process and examining what could go wrong and what can be done to avoid or mitigate the risk. Whilst a rigorous risk assessment is not a requirement for a U3A trip or event, it is sensible to consider the proposed event, step by step, and imagine the things that might go awry. These can be listed in a document to make future risk assessments quicker and easier. Some example Risk Assessments are included in Appendix 7 of this document

6.0 Insurance

- WPU3A pay a fee to the TAT for insurance cover.
- The Third Age Trust provides several forms of insurance cover for U3A members and trip organisers. The three policies most relevant to trips and events are:
 - Public and Products Liability
 - Money Cover
 - Tour Operators Liability
- It is important that the EC is aware of trips, events and groups so that they can be regarded as “in connection with the business of the U3A” and thus covered by the insurance. Trips or activities not approved by the EC may not be covered by the Third Age Trust insurance.
- There is no Personal Accident Insurance. It is the responsibility of individual members to arrange their own insurance for personal accidents.
- On The Third Age Trust website you will find details about our Insurance and Licenses. This includes a section entitled “Frequently Asked Questions - Public and Products Liability Insurance”. This contains useful guidance and gives answers to many questions you may have about WPU3A insurance cover. Note that you will require a personal login to access this site.
- Only WPU3A members, members of other U3As in joint groups and legitimate visitors are covered by insurance. Anybody else is uninsured by the U3A.

7.0 Data Protection

Since May 2018, new legislation on Data Protection has been in operation. This legislation deals with how you can collect, store and use information about other people and organisations. The EC has decided that Study Groups will operate under "Legitimate Interest". This is a legal basis for operating an organisation based upon the assumption that you have to store members' data or you could not run the group.

In order to comply with this legal basis, you have to ensure that:

- you store only the minimum data that you require; data must be obtained directly from each member of the Group and not from central sources (however information can be checked with the Groups Coordinator or the responsible trustee.)
- you delete data on members who leave the group as soon as possible;
- you store the data you have securely, preferably in a password protected computer without shared access;
- you can disclose the information you hold on members if requested to do so by them;
- you delete all information on a member if they ask you to do so.
- A person's photograph is considered to be data about them so photographs must be handled as data. If you wish to take a photograph for submission to the website or the newsletter you must first gain permission from the people being photographed. You can do this by getting the people in the photograph to sign a document giving their consent and a document for this purpose is included in the "Privacy Matters" section of the website. As an alternative, you should tell people before you take the photograph where it will be published and ask them to step out of view if they do not want their photographs to be published.
- When submitting photographs they must be in JPEG format and be accompanied with a note to the publisher (the Newsletter editor or the web master) to say that the people in the photograph have given their permission for publication.
- Please note that these rules also apply to people who are not members of WPU3A, for instance waiters, guides or coach drivers who you may wish to include in your photographs.
- In order to establish "Legitimate Interest" as the legal basis for the operation of Study Groups, it was necessary to perform a legitimate Interest Assessment (LIA). This was completed by the EC on behalf of Study Group Leaders and is included for reference under "Useful Documents" on the website
- Should your Study Group wish to share members data with any third party, it will be necessary to perform another LIA to cover the specific circumstances. A blank LIA form can be found in the "Useful Documents" section of the website for this purpose.
- More information about Data Protection is available in the WPU3A Data Protection Policy and Privacy Policy, both of which are available from the WPU3A website.

8.0 Financial Procedures

- Watford Park U3A is a Registered Charity - No. 1123484. The Executive Committee members are Trustees of the charity and therefore legally responsible for its financial operation. It is important that the following arrangements are followed. It is a key principle that neither income nor expenditure relating to Study Group activities should be passed through the personal bank account of the Study Group Leader or other group member unless this has been approved in advance by the Treasurer.

8.1 Group Finances

- Groups meeting in members' homes or free venues will not normally need access to a bank account. However Study Group Leaders must keep records of money collected for refreshments and incidentals such as photocopying or postage. There is no need to submit these accounts to the Treasurer unless they are requested, but they must be available for inspection.
- Study Groups which regularly hire transport, pay for venues or handle admission costs for visits and tours will be offered access to an existing bank account within the overall WPU3A system via the Treasurer (See para 8.2 below).
- Fees should be calculated according to the cost of operating the group. Some groups will incur no costs except a donation to the host for tea or coffee. It is recommended that this contribution be agreed at your set-up meeting. The suggested contribution (2018) is 50p per member. There may be other incidental expenses such as photocopying, telephone calls or purchase of consumables in which case you may wish to make a greater charge and accumulate a small fund for these incidentals. A charge of 5p a sheet is recommended for home printing (2018). Other expenses such as hall rental will need to be taken into account. If expenditure becomes large or complicated, discuss the matter with the Treasurer.
- Apart from small amounts of cash collected for refreshments etc, all money paid by members must be in the form of cheques made out to Watford Park U3A. These should be handed to the Treasurer who will bank the cheques and arrange the payments for hall hire, transport or other expenses.
- On no account should Study Group money be deposited in a member's personal bank account. If banking facilities are required for your group the Treasurer must be consulted.

8.2 Banking

- Groups handling significant income and expenditure, or using cheques, must use WPU3A banking facilities. Contact the Treasurer who will offer appropriate facilities and advise on processes. On no account must a Study Group Leader open a bank account in the name of Watford Park U3A. Under the terms of our Constitution, the Trustees are responsible for all WPU3A income and expenditure

8.3 Donations to other charities

- WPU3A, as a registered charity, is not allowed to make donations to other charities unless they satisfy similar Aims and Objectives. Speakers requesting a donation to charity in lieu of a fee, should accept a fee and make the donation personally. If they pay tax it may prove even more beneficial to their preferred charity if they donate through gift aid. Remember that members of this or another U3A cannot accept a fee for their work.

8.4 Expenses

- Group Leaders should not subsidise Study Groups. Do ensure that you collect sufficient money at each meeting to cover any expenses such as refreshments, printing from a computer (5p a sheet is suggested) photocopying, postage etc. If your group pays a regular meeting fee to accumulate funds for these incidentals, please keep a record of transactions.
- Although a SGL must not subsidise a Study Group, they also must not benefit financially from it. For instance, if group bookings result in free tickets for the organiser, this benefit must be shared out and result in reduced costs for all members. This rule applies to all activities, including tickets, meals and entrance fees to attractions.

Legitimate expenses may be claimed from WPU3A provided they are agreed in advance by the EC. An expenses form is included in the "official documents" section of the website. These expenses will be recovered from the members on the trip via the trip cost.

9.0 Health and Safety

- It is important that any accident sustained by a Study Group member is recorded in case there is a subsequent claim on our Public Liability Insurance. An accident report form appears at Appendix 1. Please ensure you obtain full details as soon as possible after the incident. Further copies are available from the website. The completed form should be sent to the Secretary who will keep it for seven years.
- If you are organising a trip involving an overnight stay, it is recommended that you require members to complete the "Health and Emergency Questionnaire" which is included as Appendix 2.

10**Safeguarding and Inclusivity**

- WPU3A has policies regarding Safeguarding and Inclusivity. These are available on the website on the 'Links" page.
- Safeguarding involves protecting members from abuse of any kind. There are many types of abuse, dealt with in the Safeguarding Policy and if you believe that one of your members is being subjected to any abuse, you should report it to a member of the EC immediately. If you are concerned about one of your group members, for instance if they have not attended for a while, you should contact them to find out why. You should provide a sympathetic ear, but do not attempt to intervene without first checking with the EC.
- WPU3A aims to be a fully inclusive organisation and there is no place for discrimination of any kind. Just like the U3A itself, you cannot bar membership to a group on any grounds other than the fact that the group is full. In that event, the applicant must be put on the waiting list.
- If you have members with a physical disability and your venue is unable to cope with that disability, you should consider changing venues. If in doubt, refer the problem to the EC.

11**Closure of the group**

- Should your group close, you must pay any remaining cash to the Treasurer who will pay it into the main WPU3A bank account.
- Where an outside venue is used they must be informed that the group will no longer be meeting there, even if it is a free site. Be specific which U3A you are as other groups may also use these venues.