

# **GROUP LEADERS 'MANUAL Wells u3a**

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## ***INTRODUCTION***

This group leaders 'manual is designed to give group leaders the information they need to organise their groups and gives information about how things should be organised to comply with the Third Age Trust recommendations and insurance requirements.

'Group leaders 'is a general phrase – it means anyone who has assumed the responsibility for being the contact person for a group; you may regard yourself as leader, organiser, administrator, facilitator or any other name you fancy and you may be helped in several of the roles by other members of your group.

If there is anything you need to know which is not covered in this manual, contact your group leaders 'representative by e-mail on Beacon or the telephone no. in the latest copy of the newsletter.

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### **Beacon**

As you know we are all now using the Beacon system.

The Beacon system is an online facility for managing local u3a's, particularly with regard to membership, finance and groups. It is located at <https://u3abeacon.org.uk/logon> and is accessed by username and password, allocated by each u3a Site Administrator. All u3a's are co-hosted on the same server, with comprehensive security arrangements to ensure that the data of each u3a is effectively isolated from that of all others. Moreover, the encryption key used to encrypt sensitive data fields is different for every u3a. The system is accessed by an internet browser and can therefore be used on most computers, tablets and smartphones. Recommended browsers are Firefox and Chrome but other browsers are, in general, compatible.

Group leaders should e-mail their members, keep their group register and prepare group visit forms using Beacon.

### **Check lists, forms and guides**

Accident/incident report form

Double insulation of electrical appliances

Electrical inspection and testing

Expenses claim form

Group income form

Group register

Portable appliances register

Reciprocal Membership form

Trips and visits guide

u3a group visits form

Venue checklist – day of use

Venue risk assessment checklist

Walk leader risk assessment checklist

Workshop activity risk assessment checklist

If you feel you should be using any of these and are not, please contact the group leader's representative.

However, several of these forms (e.g. register, group visits form) can now be completed using the Beacon system.

### **Data Protection and Privacy Policies**

The aim of the General Data Protection Regulation (EU 2016), which became enforceable on 25<sup>th</sup> May 2018, is to balance the rights of individuals in how their information is processed with the legitimate needs of organisations to use their information.

u3a's, being not-for-profit organisations, need to comply with the 8 Data Protection Principles - as long as the data they hold is only that necessary to maintain membership and administer activities for current or prospective members. These include things like personal data being accurate, kept up to date, being limited to what is necessary and not being transferred without a members' permission. You should be aware of our own Data Protection and Privacy Policies. They are available on our website: <https://u3asites.org.uk/wells/home>.

Now that we are using Beacon, our storage of members' details is far more secure. The group leader (or the Beacon up-dater for the group) should send emails to group members using the Beacon system rather than using their own email system. However, it is important that the details of group members on Beacon are kept up to date. The group Beacon up-dater can change the members of his or her group on Beacon but, if group members change their personal details (e-mail, phone number, etc.) this must be notified to the Beacon administrator for it to be changed on the system.

## **Duties of GROUP LEADERS**

As a group leader, you have responsibilities! It may be that you don't do all these yourself and some are performed by other group members on your behalf, but it is your responsibility to ensure they are done.

1. Make sure every member of your group is a paid-up member of u3a. This includes reminding your members when it is time to renew their Wells u3a membership on 1<sup>st</sup> February each year. Reciprocal members can be members of your group. These are members of adjoining u3a's who attend your group as the one Wells u3a group they are permitted to attend and they must complete a membership application form in order for their details to be recorded on Beacon. If they want to belong to more than one Wells u3a group they must join Wells u3a as a full member. You should also visually check their local branch membership card.
2. Keeping a register of who attends (or does not attend) your group meetings.
3. Updating your membership list on Beacon or ensuring that your Beacon up-dater (if that is not you) does this on your behalf.
4. Administration of the group – exchanging information about meetings, following up people who don't attend meetings, checking all group members' u3a membership numbers.
5. If appropriate to your group, collecting "fees" from members attending the group.
6. Again, if appropriate to your group, keeping accounts of monies received and paid out, and supplying those accounts to the Wells u3a Treasurer annually, by 10<sup>th</sup> February each year.

7. Again, if appropriate to your group, hiring the venue. (see Finance Policy)

8. Arranging for your group to serve refreshments at the Museum talk when it is your turn on the rota (about once every 4 years). Group leaders will be notified well in advance by the Talks Coffee Organiser.

9. Providing a short piece about your group for the newsletter (3 times a year), including if your group has vacancies and a waiting list.

10. Up-dating your group information on the web-site.

11. Reminding your group members to renew their u3a membership by the 1<sup>st</sup> February each year.

12. Remember that continuation of the group is a group responsibility; if the leader becomes unable to continue, hopefully someone else in the group will take over the role. Consider succession planning in advance.

13. Some groups decide on a maximum number of members, dependent on venue and how the group works – smaller groups which rely on talking need to decide how many people can contribute. Once the maximum is reached, the group leader will keep a reserve list on Beacon of people who have expressed interest, who will be invited to join if any group member resigns. Sometimes group leaders are contacted by people who would want to become reciprocal members of the group (members of adjoining u3a's who want to join the group); they have to move down the waiting list in favour of Wells u3a members who have precedence and they should join Wells u3a as reciprocal members. There is no fee for this.

14. If a member of your group stops attending, try to find out why. The most important ethos of u3a is concern and support for each other.

15. The essence of success of any group is efficient and meaningful communication. Although e-mail is the easiest means of communication, not all members are on e-mail or look at it regularly. Telephone and post are more laborious but ultimately more reliable. Some groups have a “pyramid” system, either formally or informally. Each group will devise the best way. Consideration should be given to the method of contacting group members without e-mail.

16. If an accident/incident occurs during a group meeting, complete and send in the accident/incident form (obtainable from the group leaders’ representative), including full details of group members and witnesses.

17. Make sure you give sufficient information to your group members so that they can make an informed choice as to whether or not they wish to participate; this is particularly important with groups involved in physical activities when members need to be reminded that they are involved at their own risk.

18. If you are leading walks or outings, or someone else within the group is doing so, make sure the walk leader checklist or group outing list is used and have read the advice in the **Trips and Visits Policy**.

19. If your normal group meeting clashes with the Wells u3a AGM, change or cancel your meeting, as it is felt to be more important that your group members are able to attend the AGM.

### **Equipment**

Obviously, if a group meets in an individual’s home and that person is using his or her own equipment, it is his or her own responsibility to make sure the equipment is in good, safe working order, especially in the case of electrical equipment.

If anyone has any concerns, he or she should not use that equipment. The basic advice is – **if you are not sure, don't use it.**

Electrical safety is covered in the Venue checklists - both day of use and venue risk assessment, and in the Workshop assessment. These information pages are available at the Third Age Trust website or from your group leaders' representative.

If any of these checklists apply to you, please make sure that you use it. They include:

Portable appliance register *(Generally used for public venues used by many others and the responsibility of the proprietor)*

*u3a group visits form*

*Venue checklist – day of use*

*Venue risk assessment checklist*

*Walk leader checklist*

*Workshop activity risk assessment checklist*

## **Finance**

Group leaders should comply with the protocol for expenditure authorised by Wells u3a committee and the Wells u3a finance policy.

## **INDIVIDUAL GROUPS**

Whilst it is left to the discretion of group members how they run their group, the following principles should apply:

Group leaders are responsible for keeping records of any income received and expenses incurred, except for donations towards refreshments.

Groups should cover all their own running costs, raising individual contributions as necessary. For example, if a room is hired, it would be necessary to raise the money to cover the cost. This also applies to any

equipment which has to be replaced routinely and to any expenses incurred in reconnoitering a venue or route.

Significant amounts of money should not be accumulated and kept as cash at members' homes, in case of loss. If such a loss does occur, provided that it has resulted from forced entry, the police have been informed and a crime reference number obtained, a claim can be made via the treasurer. Currently the maximum loss covered is £300. All accumulated cash should be deposited with the Treasurer as soon as possible.

If the group wishes to purchase equipment of a permanent nature, e.g. a DVD course or chess set, the request can be forwarded to the Treasurer.

If the Trustees approve the purchase, the item will be funded from the Wells u3a Main Account and become the property of Wells u3a. The only bank accounts permitted by Wells u3a are those under the control of the charity trustees ie. the Wells u3a Main and no 2 accounts managed by the Treasurer.

No group should hold a bank account for running their group nor use a personal account for this purpose. All monies collected from the members of their group, excluding tea/coffee money, for the purpose of running their group should be remitted to the Treasurer on a monthly basis or as agreed with the treasurer.

Travel expenses cannot be claimed for attending a group meeting. However, it is hoped that no-one will be unable to attend a group of his or her choice because of not being able to afford to get there. In that situation it is hoped that other group members will be able to offer transport. Insurance is not compromised if passengers only give a donation for petrol.

It may be that a Wells u3a group wishes to give a donation to a charity for a service received, for example a guided tour given by a member of another charity, e.g. the RSPB. In order to provide a donation members of the group may give a donation to the charity as individuals. It is



permitted however to pay another charity for services provided (eg.the hire of a hall or giving a talk) in these circumstances a receipt should be obtained from the charity noting that this is a payment not a donation. A form is available from the treasurer for this purpose. See section on finance.

Keep a record of all cash involved in running the group and submit to the treasurer as mentioned. This is not needed where the only cash involved is for refreshments. The key thing is to have a clear paper trail.

Please remember that all cash collected within the group ultimately belongs to Wells u3a, and that the Trustees are, in the final analysis, accountable for its use.

**Hence the need for a paper trail and for accounts to be sent to the Treasurer as agreed, as well as once a year.**

**The hiring of a room, hall or other facility, must be done in the name of Wells u3a for insurance purposes.**

**The Group leader should obtain an invoice and can either collect the money from members present and pay at the time, or can send the money with the invoice, including both an income and expenses claim form, to the Treasurer for payment. However it is recommended that all hall hire is paid for by the Treasurer.**

### **Group trips, visits and outings**

Wells u3a has a specific Trips and Visits Guide. This covers general planning, responsibilities of the organiser, health and safety, transport, finance, communications, documentation, trips and visits check list, walking checklists and emergency procedures.

Any group organiser arranging a trip should have a copy of this guide and be aware of its contents.

If you are arranging a trip and do not have a copy of the guide, please obtain one from your group leaders' representative.

Anybody organising a trip for his or her group needs to complete and take with him or her a u3a groups visits form which provides the organiser with personal details of the people attending, including their emergency contact details. This can be downloaded from Beacon but checked with the members that it is up to date. The trip organiser should ask trip participants if they have any medical condition that could impact on the trip.

### **Health and Safety**

The most important thing to remember about health and safety is that it is, primarily, the individual's responsibility. However, Wells u3a and group leaders have a responsibility, like employers, of a duty of care for their members. This includes completing the appropriate checklists and being as sure as you can be that your members are as safe as possible.

### **Insurance**

By paying an annual membership subscription to the Third Age Trust, Wells u3a has the benefit of a nationally organised Public and Products Liability Insurance, which only covers accidents either caused by, or happening to members of u3a when involved in u3a activities. This includes all claims arising from group leaders' direction of their group.

All situations are covered, whether taking place in a private home, public hall or out of doors

However, vehicle and travel insurance are the responsibility of the individual member, unless it is a transport company who will have their own insurance.

Incidents not covered:

- Injury or damage sustained due to a defect in a hired building
- Injury or damage sustained whilst under instruction with a third

party specialist instructor

Injury or damage sustained whilst partaking in hazardous activities

Claims where no injury or damage has been sustained

Injury or damage arising from the result of a motor vehicle, air craft or boat incident

Incidents which are not attributable to U3A activities

More detailed information about this insurance can be obtained from the group leaders' representative, another committee member or from the Third Age Trust (u3a national office).

## **Resources**

Wells u3a holds a considerable number of resources, which are stored in various places. These range from equipment for catering venues (gazebos, table cloths, wine glasses, jugs), audio/visual equipment (projector, screen, laptop, sound equipment, etc.) and to equipment specific to our various groups (specialist DVDs, CDs, scrabble boards and tiles, table tennis table, bats, etc.)

If your group needs anything, it is a good idea to check the resources list (held by our treasurer) before buying new equipment.

Other helpful sources are:

Mendip District Council – [www.mendip.gov.uk](http://www.mendip.gov.uk)

Somerset County Council – [www.somerset.gov.uk](http://www.somerset.gov.uk)

Somerset County Museum – [www.museumofsomerset.org.uk](http://www.museumofsomerset.org.uk)

The Third Age Trust (u3a Head Office) - [www.u3a.org](http://www.u3a.org) tel. 020 8466 6139  
– quote Wells group membership number: 219/206/93

Wells City Archives – [www.wellsmuseum.org.uk/wells-city-archives](http://www.wellsmuseum.org.uk/wells-city-archives)

Wells Library – both Wells and other local libraries have excellent facilities for research – [www.librarieswest.org.uk](http://www.librarieswest.org.uk)

### **Setting up new groups**

There are two situations in which people are minded to set up a new group: a u3a member has an idea for a new subject for a group or the existing group about that subject is full and it seems a good idea to set up a second group.

The first thing to do is to circulate u3a members with your intention (“I am starting a new group ...”), either in the newsletter or by requesting an e-mail is sent out to all members on e-mail, requesting expressions of interest to you. This can be arranged through the Beacon Administrator. Once you have sufficient expressions of interest, you can proceed.

Choose a day and time to suit yourself in discussion with the group leaders 'representative, bearing in mind which other groups run at that time.

Choose a venue – the section on varieties of groups may be helpful here. You may want to start in your home or the home of another possible group member, but you have to consider the size of the group, ease of access and parking, and what equipment is needed. Therefore, you may need to hire a venue. Groups held in hired venues charge members to cover the cost of the venue hire and refreshments.

All members of your group must be members of Wells u3a, including reciprocal members – members of an adjoining U3A who attend one Wells u3a group.

You and all members of your group are all insured for all activities as long as you are paid up members and comply with the Third Age Trust rules. Anyone who is not a member of Wells u3a cannot attend a group

meeting as this negates the insurance for all group members. The only exception to this is someone who attends a group meeting once as a taster session – i.e. someone who is considering joining Wells u3a and wants to see if the group suits him or her.

### **Sorting out problems**

Problems can arise within a group, e.g. Disagreement between members

Discriminatory language

Disruptive and/or unsocial behaviour

Failure to pay fees

Poor attendance/timekeeping

Unsuitability

In most cases the group leader will be able to sort it out by talking to the member/members in question and resolving it amicably and informally.

If this fails and the problem persists, the group leader should refer the matter to the group leaders' representative. The group organiser should not allow a situation to continue if it impacts on other members of the group.

If a member of the group is not able to cope independently, the group leader should contact the group leaders' representative for advice. Generally, however, if a disabled person needs a carer/helper to assist them to a meeting they should be allowed to attend free of charge providing this does not impact on the group as a whole, without invalidating the insurance cover. Contact details of carer/helper required.

### **Problems with Group Leader**

Initially the member/members should try to resolve the problem by discussing it with the group leader. If this is unsuccessful, or the member/members involved feel unable to do so, the matter should be referred to the group leaders' representative.

**Group leaders do not have the authority to exclude a member from the group.**

A group leader can ask a member to leave that session for health and safety reasons. The group leader must, then, contact the group leaders' representative to discuss the issue and plan a course of action.

### **VARIETIES of GROUPS**

Groups vary, dependent on their subject matter.

Some are quite small, meeting in their leader's home or at the homes of other group members. This, mainly, is because numbers have to be restricted both because of the size of the venue, because members need to be able to communicate with each other and the subject matter does not require more extensive technology.

Larger groups hire a venue, perhaps because of the numbers involved or because they need space for technology to study their subject matter or facilities to pursue it.

Other groups don't have regular meetings in a venue but tend to go out together.

Some groups combine two or, even, all of the above. This just serves to highlight the diversity of our groups – subject matter, organisation, personalities, etc. There is also diversity in how groups are organised; in some, usually the smaller ones, the group leader does all the administration. Others share roles, either having a group committee or

doing this more informally with two or three members performing the various roles needed to keep the group running.

Delegation by the leader is never a bad thing as it is helpful to encourage members to take over responsibilities so that the group can continue when/if the leader is away or unable to continue performing the role – known as ‘succession planning’!

### **Venues and Accessibility**

Some groups follow the pattern of moving round the homes of their members. However, if this happens, it is important that no pressure is put on a member to host meetings as this might not be possible for a variety of reasons.

Groups held regularly in a member’s home usually pay a small contribution to the host to cover refreshments. However, if the group regularly moves round all the members’ homes, the group may decide not to do this.

If you have a disabled member who wants to attend a group that is inaccessible for any reason, investigate an alternative venue. Perhaps the disabled member could host the group, or arrange for it to be hosted at their place of residence.

If a group is being held in a place outside Wells, not accessible by public transport, ask group members to bring other members who do not have their own transport.

### **Website**

Information about Wells u3a is available on our web-site <https://u3asites.org.uk/wells/home>, where there is information about all our groups. Group leaders can up-date this information regularly but

they need training to do this. Training to edit group pages on the website is available by arrangement with the Webmaster, e-mail: [webmaster.wellsu3a@gmail.co](mailto:webmaster.wellsu3a@gmail.co)