

## **GUIDELINES FOR GROUP LEADERS WOOLER U3A**

### Getting started

Arrange a meeting of interested members, chaired by the initiating group leader or by a committee member acting as group co-ordinator.

Discuss format, e.g.:-

Group leader to take lead for all sessions?

Group members take turns at leading a session?

Group leader to be wholly responsible for planning the programme?

Form a planning group to organise a programme?

Share workload by identifying and allocating tasks such as setting up the venue, organising refreshments, ordering resources/materials, etc.

### Setting up

Consult programme to identify available time slots.

Decide on a venue and length of session time.

Decide on a format for the sessions.

If meeting at the Cheviot Centre, negotiate with Centre manager. (Please note that one week's notice of cancellation of a session is required, otherwise U3A might be charged).

If meeting at a member's home, decide whether always to meet at the same place, or to rotate with other members.

If choosing an outside venue, the group leader must consult with the executive committee, which will need to establish terms and conditions.

### Resources

Mainly members' skills and expertise.

U3A Resource Centre.

Outside speakers may be used on a limited basis, i.e. not a regular non-member tutor.

More information is available in "More Time to Learn"; free from National Office and as a download from the national website.

Also, there are over 50 national subject advisors listed in the U3A magazine "Third Age Matters".

## Finance

The group leader is responsible for setting session subscriptions with a minimum charge of £1.50 per session, to be reviewed as required. This is towards the cost of room hire and refreshments, (refreshments are supplied by U3A) and will depend upon the size of group membership. Group leaders are not expected to pay this subscription but may do so if they wish. Walking group is exempt from charges as members do not use any facilities.

If meeting in members' homes, a sum should be decided upon to reimburse the host's costs.

Up to £30 is allowed to pay for a speaker. The treasurer must be informed one week prior to the meeting. If the cost of a speaker is more than £30, the group leader should make a case for this and apply to the executive committee for approval before making the booking. (It may be helpful in this case, to open the session to general U3A members to help offset the cost).

If funds are required for materials, resources, travel or other needs, the group leader may apply to the executive committee for financial support from the business account, so long as the costs can be seen to enhance the educational aims of the group.

## Other.

Non U3A members may attend one interest group on two occasions or two different interest groups on one occasion each. It is the group leader's responsibility to inform the visitor that they pay the session subscription but do not have to buy U3A membership subscription unless, after the two visits, they then decide to join the U3A. On becoming a full member, they are entitled to attend as many interest groups as they wish.

Non U3A members may attend one interest group on two occasions or two different interest groups on one occasion each. It is the group leader's responsibility to inform the visitor that they pay the session subscription but do not have to buy U3A membership subscription unless, after the two visits, they then decide to join the U3A. On becoming a full member, they are entitled to attend as many interest groups as they wish.

Should any problem arise which the group leader finds difficult to resolve, s/he should refer the problem to an executive committee member. The issue to be dealt with in confidence.

## GUIDELINES FOR PLANNING VISITS

1. Group leaders should plan their visit and put it before the committee for approval.
2. The visit should be offered to all members at a general meeting, with a deadline for booking a place.
3. If the group leader decides bus hire is appropriate, they should then ask the visits' organiser on the committee to book the bus.
4. For all visits, there is a standard contribution of E5 per person for bus hire, payable in advance. This is non-refundable.
5. The group leader is responsible for setting a final booking date, taking names and all payments in advance for tickets, entry fees, bus hire, etc. They should pass the money on to the treasurer when the list is complete and the payments have been checked.
6. Any question regarding refunds for non-participation should be referred to the Treasurer.
7. Any gratuities or tips should be paid by participants on the day of the visit.

## NOTES TO GROUP LEADERS

All monies received at meetings / activities should be given to the treasurer, or addressed to the treasurer and placed in the U3A letter box at the Cheviot Centre with a note stating the name of the group, date and amount. The only exception to this would be that Group Leaders can deduct the cost of purchasing the milk from these monies. As we do not operate a Petty Cash system, this seems the most straightforward approach. Groups that meet outside the Cheviot Centre can purchase refreshments / biscuits and present the receipt to the Treasurer for reimbursement. This is because of the inconvenience of not being able to access the U3A "refreshment drawer" at the Cheviot Centre

Any expenses to be paid out for speakers or general group expenses should be informed to the Treasurer, in advance, so that a cheque can be raised or cash (at least 7 days notice is required) can be withdrawn from the bank and passed to the Group Leader. It is the responsibility of Group Leaders to obtain receipts for all monies, cheques and legitimate expenses paid out on behalf of their group and original receipts should be passed to the treasurer.

If your meeting is cancelled for whatever reason, could you please ensure that Rachel Sinton is informed so we are not charged a room hire fee. A minimum of 1 week's notice is required.

Updated October 2017.