

HANDBOOK FOR GROUP LEADERS

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WELCOME

Thank you for agreeing to become an Interest Group Leader. We are sure you will find it very rewarding. This booklet provides some guidelines to help you establish your Group and ensure its continued success.

u3a PRINCIPLES

The u3a ethos is based on three principles:

The u3a ethos

- Membership of a u3a is open to all retired and semi-retired people.
- Members promote the values of lifelong learning and the positive attributes of belonging to a u3a.
- Members should do all they can to ensure that people wanting to join a u3a can do so.

The Self-Help Learning principle:

- Members form interest groups covering as wide a range of topics and activities as they wish.
- Learning is by the members, for the members.
- No qualifications are sought or offered. Learning is for its own sake, with enjoyment being the prime motive, not qualifications or awards.
- There is no distinction between the learners and the teachers. They are all u3a members.

The Mutual Aid principle:

- Each u3a is a mutual aid organisation, operationally independent but a member of the Third Age Trust, which requires adherence to the u3a movement.

- No payments are made to members for services to any u3a.
- Each u3a is self-funded with membership subscriptions kept as low as possible.
- Outside financial assistance should only be sought if it does not imperil the integrity of the u3a.

TAKING OVER AN EXISTING GROUP

Although the hard work is done when you take over from an existing Leader, there are still steps you should take to make the transition as smooth as possible.

- Firstly, you will need a 'Group Leader Induction' which will cover much of this handbook, but will also include:
 - Beacon access and training to enable you to communicate with the group, keeping within data protection rules.
 - Risk assessments. There will be a risk assessment already in place.
- Make sure you are given the accounts and group details from the retiring leader and arrange a meeting with the Treasurer. This is essential so they can agree the account balance with you and ensure you are only responsible for the group's accounts from the day you take over leadership.
- If one is allocated to the group, you will need to sign for your 'paying in' card to use at the Post Office.
- Don't be afraid to ask for help - the committee will give you any support you need.

NEW GROUPS - GETTING STARTED

Follow this step-by-step guide and you will soon be up and running.

1. Formalise your ideas

Make some notes explaining your idea for a new group and contact the Groups Coordinator. You will be invited to present your idea to the Committee, either in person or by email.

Consider what the aims of the group are – what are you hoping to learn/achieve/share by offering the group?

2. Gauge demand

Generate interest by promoting your group using as many different methods as possible.

The Groups Coordinator can email the membership on your behalf and collect the names of interested members. They can also place an article in the next Newsletter, explaining the idea, providing your contact details and requesting interested parties to contact you. Set a time limit – say within 7 days. Collect the names and emails of respondents, but please do not email them as a group

3. Establish viability

An Interest Group may be viable with only 2 or 3 like-minded people (for a niche subject, perhaps), or your idea could be so tempting that a large number will be attracted early on.

If the numbers are not what you were hoping for, try another Newsletter appeal.

Consider whether a Taster Session would help to gauge interest, the Groups Coordinator can help you to arrange this.

4. Preliminary meeting

Once you have a list of interested people, arrange a preliminary meeting. Ask the Groups Coordinator to send out an email by Beacon on your behalf, Offer them a date, time and venue and a time-limited reply. Now is the time to consider the size of the Group, thinking of venue space, cost etc.

For a small group, consider a House Group – you can always expand to a bigger venue if you grow.

5. Arrange your first meeting

Speak to the Groups Coordinator for help with finding, and booking, a venue.

Nearly there... but before the first meeting:

- We will arrange a Group Leaders induction which will include:
 - Beacon access and training to enable you to communicate with the group, keeping within data protection rules.
 - Risk assessments. We have a number of standard risk assessments. You should consider whether there are any risks that might occur as a result of the group's activities and, if you identify any, what actions you need to take to mitigate them.
- Send full details of the Group to the Newsletter Editor and the Website Manager for inclusion on the website.
- Liaise with the Groups Coordinator/Treasurer regarding the financing of the group and how this needs to be reported - u3a funds will cover the room hire for the first four meetings.

Congratulations! Enjoy your first meeting.

THE FIRST MEETING

Recommended steps to take at the first meeting:

- Introduce yourself and the purpose of the group as you see it.
- Ask about the skills within the group.
- Agree the tasks that need doing to run the group and who is willing to support these – who is willing to help with the programme or keep the register or make the tea?
- Agree, if relevant, the level that the group will be aimed at – beginners, improvers, or advanced.
- Agree how the group will work – discussion, instruction, presentation etc.
- Agree when and where the group will run.
- Identify any accessibility needs that group members may have.
- Agree the costs for running the group and what members will pay. Make sure you can cover hire costs, refreshments and any associated materials etc.
- Discuss how group members will communicate with each other, bearing in mind data protection concerns.
- Agree some ground rules e.g.
 - Be punctual
 - Listen to each other
 - Allow others to speak
 - Let someone know if you can't attend
 - Agree to disagree amicably and be respectful to other group members
 - Have patience with and encourage those who are slower to learn.

Don't forget to feedback to the Groups Coordinator the outcome of the first meeting and plans for future meetings.

HELP & SUPPORT

Resources

Subject Advisers: There are Trust volunteers with specialist knowledge in a wide range of topics. Contact details are on [u3a - Subject Advice](#) and in *u3a Matters*.

u3a publications: Check the national website for the latest publications.

Networks, regions, neighbouring u3as: allow you to draw on experience from within the movement.

Regional Trustee: will provide an overview of the region and a link to National Office.

National Office: The staff team are available Monday to Friday to offer support.

BEACON

Beacon is the name of the database management system used by u3as to manage their membership. It is a vital tool in ensuring the smooth running of our u3a and is the main method of communication.

Early on in your Group Leader journey, you will be introduced to the system during a short training session.

We will set up your new Group, and then you will be:

- provided with a username
- shown how to access the system and add members
- shown how to send out emails to the entire Group, or to selected members of the Group
- given practice in sending an email

Once you have used it a few times, you will be able to easily contact your members by a single email without compromising the Data Protection rules.

You can also be contacted by the Groups Coordinator or any other member of the Committee, as required.

COMMUNICATION

Effective Communication - this is the key to running both a successful u3a and a successful group. As a Group Leader you will be contacted by the committee using Beacon and be kept up to date on important matters. If you are asked for a response, please reply in a timely manner; it's courteous and it helps everyone to get the job done.

Please keep your membership details up to date. If you become aware a member has passed away, please inform the Membership Secretary. It helps us avoid sending potentially distressing emails.

Email -You will be given full training on the Beacon system. You will be shown how to use it and how it helps us maintain members' privacy and fulfils both our and your obligations under the Data Protection legislation. You can add attachments and links to Beacon Messages so there should be no need to use your personal email account for group-wide messages. This only increases the risk of a data breach.

WhatsApp -In some groups a WhatsApp Group can be useful, provided it does not become intrusive. You should make members aware that by joining the WhatsApp group they will, by necessity, share their mobile number with other members.

If some members agree to use this form of communication, try to **confine the WhatsApp messages to matters relevant to the group and avoid allowing it to become an 'open forum' chat line**. Remember, once you have put something in writing online it will be there for others to see.

RISK ASSESSMENTS

We have four standard Risk Assessment to cover most of our activities. The details will be covered in your induction. All Risk Assessments are available on our website under the Members page or via the Group Leaders page

- General Risk Assessment
- Homebased Group Risk Assessment
- Travel Group and Trips Out Risk Assessment
- Walking Groups Risk Assessment

Within each there is incorporated a Members Personal Risk Assessment.

If your Group's activities are not adequately covered by any of these, we may need to write a separate assessment.

Risk assessment should be shared with new members of the group.

POLICIES AND PROCEDURES

All our policies are available on our website.

- Finance
- Data Protection and Privacy
- Safeguarding
- Equality, Diversity, and Inclusion
- Accessibility
- Complaints
- Disciplinary
- Car Sharing
- The Members Code of Conduct

It is recommended that you also have a look at the advice section of the National Office website where a range of useful information can be found. It is also a good idea to sign up to the newsletter that is sent out by the Trust every month as this will keep you up to date with wider u3a news. You can sign up to the newsletter via the national website.

If you want to recruit new members, consider having a table at the u3a monthly meeting to promote your group.

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 Groups Coordinator or a member of the Committee if you are unsure how to resolve the problem or just want someone to explore options with. You can also ring National Office if you want to talk something through or check something out.

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 Groups Coordinator or a member of the 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

Report all accidents and incidents to your committee as soon as possible and complete an Incident Form. A standard email report form is available on Beacon. 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 group activities.

FINANCIAL MATTERS

All groups should be self-sufficient although the Committee can authorise a loan to cover initial costs until group membership fees are paid.

GROUP MEMBERSHIP FEES

Can be collected at each meeting or in advance to cover a block of meetings. If a group is meeting in a private house, where there is no rent to pay, the maximum fee charged should be 50p per person which is given to the house owner to cover electricity, etc.

Expensive events such as days out should be charged at cost and all participants should pay appropriately. The value of any free places should be shared out among the participants.

PETTY CASH

A maximum of £50 can be kept to cover small expenses (tea, coffee, biscuits etc). All other income should be banked, in accordance with the Finance Policy, into the Worksop & District u3a account.

You may be given a 'paying in' card to enable you to pay money in at a Post Office.

When you pay any money into the bank, please inform the Treasurer of the amount and what balance in Petty Cash you hold.

Each group has its own 'pot' within the main account so any money banked is for the use of your group only.

PAYMENTS

Larger invoices such as paying for speakers, equipment etc. should be passed to the Treasurer for payment.

ACCOUNTS

It is your responsibility to keep up to date accounts for your group.

The Treasurer will send you a regular account balance, please check that this agrees with your records and contact the Treasurer if there are any discrepancies. Make sure the Treasurer has your current email address.

ROOM HIRE

If you are hiring a room at one of the centres run by Bassetlaw District Council, they will send the invoice to our Treasurer for payment. If you are hiring a room elsewhere, please ask for the invoice to be forwarded to our Treasurer. Please make sure the Committee is aware of where you are meeting by informing the Groups Coordinator and notifying any changes.

Room hire costs will be covered by u3a funds for your first four sessions

COPYRIGHT

A CLA licence allows some materials within limits for educational use within groups. A licence can be purchased from the Trust for £60 a year. The Trust also provides a PPL (Phonographic Performance) PRS licence to cover the playing of music and an MPLC licence to cover the showing of films. These are included in the fee that u3as pay to the Trust.

There are limitations to each of these licences and if you are going to be using copyright material in any form, for example, printed, audio or pictures, please check the [support for u3as section of the u3a website](#) for further details.

RELATED DOCUMENTS

Available from the National Website – www.u3a.org.uk

- Growth Matters
- Interest groups
- Financial Matters
- Insurance FAQs

USEFUL CONTACTS

www.worksop.u3asite.uk Worksop & District website

www.u3a.org.uk national website

Chair – chair.wdu3a@outlook.com

Treasurer – treasurer.wdu3a@outlook.com

Groups Co-ordinator - tbc

Business Secretary – bsec.wdu3a@outlook.com

Membership Secretary – membership.wdu3a@outlook.com