

Handbook for Group Leaders

1 Foreword

The aim of this handbook is to both help new Group Leaders with their initial group organisation as well as to provide more established leaders with some detailed information and procedures. With this in mind, this handbook has been produced with reference to the Third Age Trust's procedures and guidelines and tailored specifically for March u3a. There is also reference at the end to some March u3a specific documents which can be read online or downloaded from the March u3a website.

Above all, however, it is important to remember that you are dealing with grown adults who, though responsible for their own wellbeing, are always susceptible to mishaps and accidents therefore you must always use your best ability to undertake a risk assessment, to provide good and meaningful advice to participants and, most important, use common sense especially when out and about or on group trips anywhere.

2 Structure of interest groups

There is no standard structure for how groups are organised. The only specific policy of March u3a is that each group should be, as far as possible, financially self sufficient. Possible types of group leadership are:

1. A member knowledgeable in a particular subject may be the group leader, imparting their knowledge or skills to the group members. It is usual in this case for the subject "expert" to set the frequency of meetings and topics to be covered etc.
2. Or the "expert" can provide the teaching/subject content, while a second group member can be the contact person/administrator for the group, liaising with members regarding the times, venue, topics etc.
3. Some groups require no expertise at all, just meeting to share information by, for example, watching DVD courses or by doing activities together like art or crafts and sharing ideas.
4. Some groups e.g. Walking Groups, Tai Chi, lunch/outing groups just meet to have fun or to exercise but still need a leader to act as administrator, to keep records and to keep the members informed of events etc.

3 How an interest group is started

Anyone considering starting a new group should first of all contact the Groups Co-ordinator for advice on the viability and for assistance in setting up the group, if needed.

N.B. No group should plan to meet at the same time as the main monthly meeting (currently on the second Wednesday afternoon of the month). Group meetings may take place in the daytime or in the evening.

4 How members join a group

Some members find out about groups from other members, via the monthly notice sheet, or from the notice board at monthly meetings. The majority of potential new u3a members find the information on groups from the March u3a website (<https://march-cambs.u3asite.uk>). Group leaders should ensure that the website entry for their group is both complete and up to date i.e. showing:

- Name of group
- Day, time, frequency and venue of meetings
- Brief description of how the group operates
- How to contact the group leader - usually by sending them an email via the website.
- Email or give the above information, or any updates , to the Website Administrator and copy in the Groups Co-ordinator.

5 Management of an Interest Group

Venues:

1. If your group has a small number e.g. less than 10 members, consider meeting at your home or home(s) of willing group members where this is possible. In this case suggest and agree on a small charge e.g. 50p-£1 to cover refreshments etc.
2. If your group is too large for a private home or needs access to specialist equipment use a hired venue such as library, church hall, community centre, sports hall ,school hall etc, all of which will charge a fee. Some others e.g. public houses and cafes may just ask that group attendees buy a drink - please ensure this is complied with.
3. A **risk assessment** for all hired venues needs to be in place and regularly checked and updated (usually overseen by a Committee member).
4. The Group Leader should regularly book the venue and ensure all invoices are paid in a timely fashion or delegate this task to a named willing group member.
5. Collect sufficient attendance money from group members to cover all costs. March u3a may indemnify a group Leader against room hire losses that may occur through lack of attendance if absolutely necessary. However in the long run a change to a cheaper venue may be necessary or an increase in fees for attendees.

Cancellations and change of venue

In the case of temporary cancellation/change of venue inform the venue promptly. Inform group members directly i.e. do not put temporary changes on the Beacon system.

For a permanent change e.g. to the venue, time or day of meeting etc. inform the Groups Coordinator, the Website Administrator and the Business secretary so that group information is kept up-to-date on the website, on Beacon and via the monthly notice sheet.

6 Using Beacon

Beacon is a management information system for recording data about members, groups and finances of u3as and for communicating with selected sets of members or with all members. It is available to Group Leaders to aid the running of groups. Each leader need access to a personal computer or tablet/iPad. Use Beacon to record information about your group, what it does, where it meets, when, how often etc. and to record a list of members.

Use Beacon to email all, or some, of the group members as required and check whether those emails have been delivered. Emails are addressed individually and so maintain members' security.

Please contact the **Beacon Administrator** if you would like to use the Beacon system (it *is* March u3a's preferred method for group Leaders to maintain records and to contact members). The Beacon Administrator will offer training on how to use it.

Interacting with group members

- As stated above contact group members via the Beacon emailing system if possible. If not using Beacon you may keep and use your own email list of members but always use Bcc(blind copy) if emailing the whole group at once to maintain members' security.
- Ensure your group attendees are **current** u3a members (unless having a taster- see later) by either checking the Beacon full membership list (those who have not renewed or joined will appear in red) or by asking to see a Membership Card.
- Ask members to provide emergency contact information and keep a record of this. Offer to provide a N of K card available from the Committee.
- Keep a register and attendance record for your own use but also to provide information to the Committee if requested. A member's contact details should not be shared with other members unless their permission has been granted.
- If a member misses several consecutive meetings without explanation, check whether they are still interested in being part of the group, especially if the group has a waiting list(see later).

Maintaining a waiting list

If a group is full then group Leaders should maintain a waiting list and allocate places on a "first come first served" basis. Let the Groups Co-ordinator know if your group is full.

There is a simple method for maintaining a waiting list via Beacon (the Beacon Administrator can explain how to use this).

7 Problems with Group Members

In the case of disruptive and/or unsociable behaviour or strong disagreement between members which is impacting the enjoyment of other members, try to resolve the situation informally by having a word with the member(s) in question.

In certain situations the Leader may have to ask a member to leave the group for the remainder of a session. If a situation needs more than this or the problem persists then refer the matter to the Groups Co-ordinator who will try to assist but may have to discuss the issue with the Committee. Group Leaders do not have the authority to exclude a member permanently, that would definitely be a decision for the Committee.

Purchase of equipment

It is normally expected that group members should bear the cost of new equipment but the Committee will consider any request to subsidise equipment purchases especially if it can be used by other groups too or it facilitates the start up of a new group. Any such equipment is legally the property of the u3a and should be recorded with the Treasurer.

Group money

- If money held by the group becomes significant it should be passed to the Treasurer, banked, and managed by the treasurer.
- Member payments for the group's expenses in the form of cheques (made out to March u3a) should be passed to the Treasurer to be banked.
- Bank Transfer payments should be arranged with the Treasurer.
- Keep a record of all money collected and payments made, including copies of receipts, invoices etc. and make available to the Treasurer when and if requested.
- Groups may pay a fee and/or expenses to an outside speaker/tutor for a **one-off** talk or support session only. Do not engage the same speaker/tutor on a regular basis.
- Group Leaders or their deputies/assistants are not permitted to use their own bank account or to open a separate account for group monies.

8 Having an extra Leader

Larger groups may want to have a deputy or joint leader to share the load of running the group administratively or by leading or planning group sessions. Other group members should also be encouraged to help run the group e.g. by hosting group sessions, or by leading a session, doing research for a meeting, planning outings or e.g. by collecting the group fees.

Multiple Leaders/administrators can be recorded on Beacon for any Group.

9 Failing groups/ Over-successful groups

Failing groups: Try to establish the reason for falling numbers - does it need a change of day or time or venue? Does it need livening up with new ideas/activities etc? Discuss with the Groups Co-ordinator who will try to help with this and by e.g. putting out a notice to all members about vacancies within the group.

Inform the Groups Co-ordinator, Beacon Administrator and Website manager if the group does cease operating. Return any funds and equipment to the treasurer.

Over-successful groups: If a group becomes too large or has a persistent waiting list then inform the Groups Co-ordinator who may be able to assist with finding a larger venue. Consider starting a second group especially if there is a current group member or someone else among the wider membership who is willing and able to be its leader.

10 Using the u3a Website

See section 4 on “how members join an interest group”. The website must be kept up-to-date.

11 Using the Monthly Notice Sheet

Supply the Business Secretary with short term information about the group organisation including occasional planned cancellations, changes of venue, extended breaks etc. Send such information to the Business Secretary by the Friday before each monthly meeting so there is time to include it in the notice sheet shown on the website and displayed at each meeting.

12 Arrangements with other local u3as

A member from another u3a in our area may attend one of our interest groups on a regular basis without having to join March u3a if there is a reciprocal agreement with the other u3a. However if our group has a waiting list priority must be given to members of March u3a. Inform the Membership Secretary if you have any such joiners who will record them as non-paying Associated members of u3a for insurance purposes.

13 Taster sessions

Potential new u3a members are permitted to attend a group once to see if they want to join it. They are also permitted to attend one other group for a “taster” and attend the monthly general meeting once before committing and paying the fee to join March u3a. The person is expected to contact the Group Leader to arrange a taster session.

14 March u3a equipment for Groups' use

March u3a has a few items that groups may use including:

A laptop computer; a projector with connections for displaying images from a computer; an amplifier with speakers and two microphones; a projector screen; 2 flip chart boards plus pens/paper; folding notice boards. Contact the Treasurer or Chairperson for further information.

15 National, Regional and local u3a resources

The national u3a body (the Third Age Trust) has a large number of resources which Group Leaders may wish to access e.g. DVDs and CDs (borrow free of charge), access to National Advisors for some subject areas, access to online courses and workshops. March u3a will support Group Leaders wishing to attend workshops e.g. by paying any fees and expenses.

For further resources information see the Third Age Trust website on: <http://www.u3a.org.uk>

16 Health and safety

- Full Health and safety information is available on the March u3a and national websites but briefly:
- Group attendees are responsible for their own and others' health and safety and participate at their own risk.
- Group Leaders should obtain from members (or from Beacon if it is recorded) the details of an emergency contact and have these details accessible during group meetings or activities.
- Leaders of groups involving some form of physical activity do not need to hold professional qualifications in the area but must satisfy the Committee that they have sufficient experience.
- Leaders are **not** required to have a trained First Aider present at meetings or on trips out but a First Aid kit can be made available and it is wise for some groups (physical activities) to carry one. Insurance advice is to contact the emergency services in the event of a serious accident but **do** complete an accident form for any incidents and pass to the Committee as soon as possible. This form and a risk assessment form can be downloaded from March u3a website.

17 Members with Disabilities

Our accessibility policy states that we will encourage those with a disability to bring carers with them to u3a activities with no additional cost to the carer. The carer will fall under u3a liability insurance, unless they are a professional carer, in which case the individual will be covered by their employer's insurance cover.

18 Online Documents

The Members Page on the March u3a website includes a link to a page giving all March u3a Guidance, Policies and Procedures documents each of which can be read online or downloaded and printed.