

Information for U3A Group Leaders

This is a reference document for leaders. It sets out the guidelines and rules that need to be followed and gives advice on topics such as finance, resources and venues.

We recommend that you keep a print-out to hand with your paperwork for a first port of reference when a query is raised.

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1. Summary

In Summary a Group leader's role is to:

- Lead the purpose of the Group (meetings, content, speakers, tutors, etc)
- Manage Group membership (contact list, check attendees are paid-up members)
- Manage meetings (register attendance)
- Control and record money (keep simple accounts that can be scrutinised)
- Publicise (encourage new membership)

Interest Groups are the lifeblood of the u3a. As such the role of Group Leader is of the greatest importance. Support for leaders comes from the Interest Group Co-ordinator, from other leaders and from the main Committee members – all of whose contact details can be found on the website.

The National u3a website <https://www.u3a.org.uk/> has a wealth of information

2. Introduction

Thank you for taking on the role of a group leader for u3a. The interest groups are the life blood of our U3A and they cover a wide range of subjects. The groups provide a social and friendly environment for people with a particular interest to get together, share experiences and learn. Some of the groups have been established for many years with the same or new leaders taking over established groups, other groups run their natural course or “morph” as interests, the environment or people change and move on.

No matter how long a group lasts for those involved the experience should be a positive one.

All the groups work independently although on occasion one or more may combine, for social outings, a Christmas extravaganza, the Pantomime was a great success, or for specific projects: for example the illustrated publication "The Art of Creative Writing".

There is an **Interest Group Co-ordinator who tries to ensure new leaders are supported and that the “Timetable” of group meetings does not clash too much.** This is because many members do belong to more than one group.

If you have problems or queries feel free to ask the co-ordinator or any member of the Committee for help; we will do our best to assist you. The co-ordinator’s email is on the “Contact us” page of the website and the phone contact is on the “Interest Groups Contacts” page in the Groups section of the website.

A full list of active and past groups can be found in the Groups section of our website.

3. General Guidance

3.1 The role of a group leader

- Co-ordinates the group activities
- Leads a programme preferably put together by the group. Originally the group leaders were called conveners, which is probably a more apt description
- Plans the sessions, keeps members on the subject and an eye on the time
- Is aware of people’s specific needs (impairments, travel issues etc)
- Has a back-up plan if things go awry

A Group Leader is not expected to be:

- An expert or professional
- Different from rest of members of the group
- Fully knowledgeable about the subject

A Group Leader should try to avoid:

- Doing too much of the talking
- Commenting on others views
- Allowing one member to dominate

3.2 Organisation of a group

The leader agrees the regular meeting date and time (for example the First Tuesday of the month, 10:00–12:00), **venue(s) and the group's activities/programme with the members.**

The group leader may need to set a limit on the number of members that can be accommodated in the group.

Any member wishing to join a group needs to contact the group leader. **The leader should check that those joining the group are fully paid up members of Llandrindod u3a** asking to see their membership card or checking with the Membership Secretary.

The leader should keep a record of the members of the group and an attendance register at each meeting. This is important for insurance purposes.

Leaders need to monitor attendance. If someone has not attended for, say, three sessions then contact is advised to check that all is OK (it could be that health/social support is needed) or maybe there is no longer any interest in what the group is doing. It may be that the member wants to become an occasional attendee and to be kept on the mailing list. However, membership is at the leader's discretion and, for example if there is pressure on numbers, it may be that an infrequent attendee is asked to give up their membership of the group.

Non u3a members considering joining a specific interest group can attend one meeting of that group on a trial basis and should pay whatever the charge is for that meeting. They then need to become full u3a members to continue participating in that group. There may be times when someone turns up without notice. It is recommended that the leader treats this as a "taster" session and that the newcomer is advised that he/she has to be a paid-up member and is referred to the Membership Secretary, contact details being taken.

Carers for disabled members who are not themselves a u3a member can attend meetings in their capacity as carers and should contribute to any funds they benefit from such as refreshments or materials.

The group should as far as possible be self taught bringing in specialists, tutors, speakers only with the agreement of the group.

If the group is at maximum capacity then the leader can keep a waiting list or preferably encourage the group to split and start a second group with another leader to allow more participation.

The group leader must let the interest group co-ordinator know if they plan to step down or if the group winds up.

4. Publicising your group

Make use of the website. Your group will have its own page which you can either update yourself (training will be given) or you can email material to the website manager.

Announcements can be made at main monthly meetings. Please give a clear written note to the Chair before the meeting.

Displays at the monthly meeting. Posters can be displayed on the notice boards at the back of the room. If you want to put on a larger display of the group's work or attract new members talk to the Interest Group Co-Ordinator or Membership Secretary.

There may be occasions when contact with the local press or with like-minded non-u3a groups is advantageous.

5. Money Matters

Members of the committee are deemed by the Charities Commission to be trustees and to be fully responsible for whatever is done in the name of the organisation, **this is a legal requirement.**

5.1 Yearly returns

All Interest Group Leaders must keep financial records and make annual returns to the treasurer. This can be a simple record of money incoming and spent.

5.2 Car sharing

As groups are self financing all members of the group must pay their share of expenses. This includes sharing **travel costs** when car sharing. Leaders **should not** encourage drivers to be "generous" by not charging. Miles recorded are multiplied by rate per mile (0.30 pence) and divided by number in car, including the driver. Payment of an individual's share is then given to the driver at the end of the journey.

5.3 Accounts

An Interest Group account can be opened under the u3a umbrella account (the Treasurer supplies a paying in book) these accounts are in the group's name, are used solely for the activities of that group. All payments for major trips/ activities etc are paid into this separate account. If an event is cancelled the money goes back to the individual members, if an individual member cancels then refunds may depend on the circumstances, at the discretion or operational rules of the group.

Alternatively each group holds its own cash and keeps accounts. All financial transactions must be recorded, so members of the group and the treasurer can receive their annual accounts report and scrutinise at any time. Trips and visits, of necessity, must be more rigorously recorded. If in doubt, discuss with the Treasurer. **Bank accounts independent of the u3a should not be set up.**

Application can be made to the committee in special circumstances for financial help or loans, for example to purchase a piece of equipment, requirement for help with a start up fund, or deposits.

5.4 Reimbursement

Any expense should be agreed by the group before it takes place. If a group leader or any other member of a group incurs any expense on behalf of the group, it should be reimbursed by the group.

Reimbursement from funds is dependent on presentation of a receipt or other documents.

Some groups may have specific rules on reimbursement for example the Charabanc Club. *The only rule is that once you sign up for a trip you are committed. As the trip and costs for all will be organised and booked on the basis of those signatures. Should you be unable to go at the last minute you will have to find someone else to take your place or take the financial "hit".*

6. Insurance/ Safety First

All members (not just the leaders) are expected to exercise a duty of care.

Leaders must undertake risk assessments covering venues and activities, and in the wake of Covid 19 ensure compliance with any Welsh Government and u3a National guidance.

There is National u3a Public and Products Liability Insurance cover for all u3a members during u3a activities. It insures a u3a member against compensation claims arising from injury or damage to property suffered by a third party, or claims arising from the failure of a product, for which failure the u3a member is held to be legally liable. **It is not a personal accident insurance.**

Offering a lift to another member to attend a meeting is classed as "neighbourly" action and not covered by the u3a insurance. This means that drivers should check they have adequate insurance cover.

7. Accidents and Medical Emergencies

Whether at the normal venue, outdoors or on a trip, **leaders need to have emergency contact details to hand.** This can most easily be achieved by having an emergency number added to the mailing list (carry printout on trips) but members have the right not to be so listed.

On trips especially, any member's emergency contact not on the leader's list must be encouraged to provide a contact number which can be handed back at the end of the trip.

Accidents should be reported formally to the Committee Secretary on an Accident Form which can be found on the Documents page of the website.

If there is an illness or accident locally not requiring emergency services, but medical attention or checks, the individual should be taken to Llandrindod Hospital, not the surgery.

8. Data Protection

Please ensure that any list of names, email addresses, telephone numbers or addresses are kept up to date and in strict confidence, since the Data Protection Act requires us by law to be circumspect with member's personal data.

Old data should be destroyed once it is no longer needed.

9. Resources for Group Leaders

9.1 Using Equipment/ Licences for Public Entertainment

- Equipment may be held by the group or shared and accessed via the Interest Group Coordinator.
- Training in use of our u3a equipment can be provided.
- Equipment is insured up to £1500.
- We do hold a licence for showing films which is renewed annually. It is also worth checking if venues used hold music licences.

9.2 Details of all resources and sources for group leaders can be found on the u3a National website www.u3a.org.uk

- **Downloadable Forms** such as Venue and Risk Assessment Checklists, Accident Forms etc
- **Design Resources** for producing posters, handouts etc Advice on Fonts, Logos etc
- There are **u3a subject advisors** and networks nationally which cover a vast range of subjects.
- **National Resource Centre**; has a collection of material available for all u3a groups to borrow, free of charge except for return postage including slides, videos, audio cassettes, CD's and DVD's. When you register via the National website you will be issued with a number which allows access to search the catalogue, while lists are free and available on request for specific interest areas.
- There are also **networks of u3as nationally and more locally**, a good way of finding others who may already be running similar groups in Wales or over the border, providing good contacts and even opportunities for joint "Zoom" meetings and outings.
- **On-line courses are available on the National website**. Tutored courses are charged for and run for eight weeks with work done via e mail or online. There are no exams marking or grading, learning is for enjoyment and satisfaction.
- **Projects**. These are highlighted in Third Age Matters and u3a National Newsletters and the committee try to bring these to the attention of our members who can take part as individuals, for example recent Retail Project or the Walking Trails between towns and villages.

- **Shared Learning Projects:** typically based on an institution, gallery, or museum. Members from different u3as meet with representative (usually the Education Officer) and agree a project of mutual benefit, timing, method and outcome(s). Results often published in the Sources magazine which is the educational journal of u3as.
- **u3a Summer School** – four day residential where courses are usually subject based, good for group leaders stimulating new ideas, material, networks. A list of courses is usually published in the autumn and costs vary dependant on locations held and accommodation.
- If taking over an existing group there will probably be resource material available and help from existing members and retiring leaders.

Be aware that making and distributing copies of a copyrighted document is allowed for educational purposes within the remit of the u3a which has a blanket license. This license does not cover maps, newspapers, or sheet music including the words. You are allowed to copy extracts from a book (5%, one chapter, or one article) if the book is published in the UK.

10. Venues

Many groups currently meet at the leaders' homes. This reduces the cost of the meeting to the price of refreshments which group leaders charge for at between 50p and £2 per head. It can be a good and cost effective way to get a group started.

One of your worries may be finding a suitable venue. There are many potential venues in Llandrindod Wells and District but not all are suitable in terms of cost, size, location or access.

The following are some suggestions which have been previously used, leaders/group members will need to check availability and costs as these change;

- The Arlais Dance Centre
- The Thomas Shop, Penybont
- Village Halls and Community Centres, Llanyre, Crossgates, Howey
- The Radnor Museum, Top floor room hire
- The Fire Station. Free but fire/police can take over room at short notice
- The Commodore Hotel, De Winter Room, Currently free if purchase coffee/tea
- Celf-o-Gwmpas, popular venue
- Cafes; Herb Garden, The Lakeside Restaurant etc. Usually free if purchase coffee/tea but they can get very busy in the summer months and thus less welcoming.
- Metropole Hotel
- Ashfield Training Room, Howey
- The Computer Centre, Oxford Road

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