

Group Leaders Handbook

Step by step guide to setting up a u3a group in Chinnor & District

Further information and resources are available on the Third Age Trust¹ (TAT) website

<https://www.u3a.org.uk/members-area>

All members of u3a can access this by creating an account.

Introduction to interest groups

Thank you for agreeing to become a Group Leader. Whether you are starting a new group or taking over from an existing Group Leader this information may be useful.

Although each group will develop its own structure it is important that the group follows the u3a ethos of shared, participative and self-help learning. With the aim of increasing knowledge and creating a supportive and friendly atmosphere which enables everyone to participate.

u3a principles

The u3a ethos is based on three principles:

The Third Age Principle:

- Membership of a u3a is open to all but especially those in their third age who may have more time to engage in activities.
- 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 a wide a range of topics and activities
- 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.

The Mutual Aid principle:

- Each u3a is an operationally independent mutual aid organisation, but as a member of the Third Age Trust, (TAT) need to work within the principles of the u3a movement.
- No payments are made to members for services to the u3a.
- Each u3a is self-funded with membership subscriptions.
- Outside financial assistance should only be sought if it maintains the integrity of the u3a.

¹ Same as National u3a

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Considerations when forming a new group

1. Help and Support

When setting up a group it is useful to identify others with subject expertise, a deputy and members who might help with the various tasks required.

2. Choosing a venue

APPENDIX 1 (see separate document) provides a list of venues and contact details.

The capacity and availability of rooms will be important factors determining the day and time of sessions. If you are not familiar with the venue it may be useful to arrange a visit to assess the suitability for the type of activity offered.

3. Selecting day/date

There is a 4-week schedule for group activities on the website. It is good practice to avoid clashes with other groups, particularly if it is envisaged that they will attract a similar audience.

4. Deciding how much to charge?

Interest groups are expected to be self-financing as money is collected from the attendees to support activities. These include

- **Room Hire:** divide the room rate between the average number people expected to attend. Invoices can be to the treasurer for payment
- **Refreshments, materials, equipment and speaker fees:** calculate these costs to be included.
- **External activities:** these include theatre trips, visits or educational days out and should be charged at cost and include all out-of-pocket expenses.

5. Sourcing and Booking Outside speakers

When booking outside speakers their fees and any travel costs should be agreed in advance. If a speaker is being remunerated by the u3a they are responsible for maintaining their self-employed status for tax purposes. Invoices can be sent direct to the Treasurer or payment can be made from funds collected from members.

The Thames Valley Network and TAT have a list of speakers. This is distributed to all group leaders twice a year by the group coordinator See also **APPENDIX 2** (Strategies for Energising the Group)

6. Managing the money

When a group is first set up, they can apply to the Committee for financial support for an agreed period of time (e.g room hire; speaker costs). Sometimes groups, will be supported by external grants.

A group member should be designated to collect the money.

There should be a discussion with the Treasurer to agree a process for paying in funds collected trchinnoru3a@gmail.com

It should be noted that the funds of SIG's belong to the u3a but groups are permitted to make any expenditure deemed necessary by the group leader/members. When funds are held centrally they will be ringfenced and can be withdrawn on request.

The Treasurer, SIG Co-ordinator and Group Leader(s) will agree a process of recordkeeping of transactions in order to:

- assist the Treasurer in keeping accurate accounts, to meet regulatory requirements
- enable the group members to understand how their funds are being used and managed.
- maintain transparency and trust for all concerned.
- minimise the risk of error and potential loss of funds.
- enable group leaders to maintain cash floats

7. Promoting the Group and advertising the group to other u3a members

Promoting the group is key to attracting members. Information can be communicated to all members of the Chinnor and District u3a in a range of ways including global email via Beacon; inclusion on the local website; Keeping in Touch (KiT) Newsletter; Facebook and other social media

A description for the group, the date and times of events, venue, cost of meetings and any other relevant information should be sent the SIG's Coordinator groupschinnoru3a@gmail.com
Or a creative poster may be a good way of conveying the required information

8. Follow up and Keeping InTouch: Good practice

The groups that are most successful communicate with their members on a regular basis (at a minimum before and after events/ meetings) and post information on the website to provide information about previous and future meetings to keep members engaged and interested.

9. Risk Assessment of activities

Consideration should be given to whether there are any risks that might occur as a result of the group's activities. Most venues will have undertaken their own risk assessment, and it is advisable to check this. This will not be the case if meetings are being held in a private home. The risk assessment forms can be downloaded from the National website.

<https://www.u3a.org.uk/members-area>

Once complete it should be kept by the Group Leader as it may be needed in the event of an insurance claim. Further advice is available from the SIGs Coordinator.

10. The first group meeting

It is useful to organise an initial meeting, inviting those who have expressed an interest. The aims would be to outline the purpose of the group, establish interest and commitment from members, map out the program of activities, identify a team to assist with the running of the group. Further assistance is available in **APPENDIX 3**

If after the first meeting, any further assistance is required the SIG Coordinator is available

11. Use of Beacon u3a Administrative System

It is a requirement that as a new group leader you will use the u3a administrative system called Beacon. This will ensure that there is compliance with GDPR principles and will allow records to be kept of group members; verification of members; sending of emails; It will also enable the maintenance of a ledger; production of a calendar. Further information and support is available from the IT Manager. sysadchinnoru3a@gmail.com

12. GDPR

All Groups leaders are required to read and sign the confidentiality agreement and relevant guidance

Only essential Personal Data may be collected. This needs to be kept securely and not disclosed to others without permission.

Useful advice

- Best and safest practice is to use the Beacon email system
- By exception if using emails the bcc function must be employed to avoid disclosure of personal email addresses (unless permission has been given). Consent to use Personal Data should always be sought. For full information please see GDPR (privacy) guidance on the website <https://chinnor.u3asite.uk/policies>

13. Useful documents and guidance and procedures (See also APPENDIX 4)

The relevant guidance and procedures are listed below and are available on the website <https://chinnor.u3asite.uk/policies>

- Data protection
- Safeguarding
- Equality, diversity and inclusion
- Complaints
- Incident reporting

The following documents can be accessed on the National website <https://www.u3a.org.uk/members-area> (You will need your membership number and a login to access this page or simply register for an account)

- Interest Groups Matter
- Growth Matters
- Finance Matters and Finance FAQs
- Risk assessment templates
- Equality, Diversity and Inclusion sample policy
- Data Protection Policy template
- Accessibility sample policy (England, Scotland and Wales)
- Insurance FAQs

Copyright issues

It is necessary to check the copyright status of any material used. A CLA licence allows some materials within limits for educational use within groups. The u3a 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 is paid to the Third Age Trust pay to the Trust. There are limitations to each of these licences if copyright material is to be used in any form, for example, printed, audio or pictures. Further information available on the website.

<https://chinnor.u3asite.uk/policies/>

14. Managing challenging situations

Sometimes issues can arise within a group that disrupt the group. It is good practice to resolve problems early. The SIG's Coordinator or Chair are available for advice. Further information about managing difficult issues can be found in **APPENDIX 5**

15. Accidents and incidents

If an emergency incident happens during a group activity the appropriate emergency services should be called. All accidents and incidents should be reported to the Chair as soon as possible and an incident form should be completed. The Incident Report form template is available on the website. <https://chinnor.u3asite.uk/policies>

In the event of an insurance claim, it is important to have an accurate record of events. Insurance is provided by TAT and covers all u3a members whilst engaged in u3a activities. Further details (including excess levels) can be found on the u3a website.

All members should provide In Case of Emergency contacts, and these should be kept secure and reviewed annually.

Karin Dawson-Smith – Special interest Groups Co-ordinator

groupschinnoru3a@gmail.com

Appendix 1 – Venues and contract rates – Please contact the SIG Coordinator for further information

APPENDIX 2 STRATEGIES TO ENERGISE THE GROUP

Suggestions to make a group engaging and exciting by mixing the methods and opportunities for learning:

- **A visiting speaker:** A visiting paid speaker, non-paid tutor or someone from another interest group or u3a.
- **Group member presentations:** A presentation by a member of the group or a member leading the meeting on a specific topic.
- **Discussion groups:** Some activities will lead to discussion
- **Project based:** A project chosen by the members. Each person (or pair) allocated an area of research which they bring to the group. This can be a good way to learn about new technology.
- **Practical work:** This might be relevant to science, craft, photography, creative writing, storytelling.
- **Drama:** Create a short sketch and provide some entertainment for the monthly meeting.
- **Themes:** Organise an event or presentation linked to a specific topic or visit.
- **Liaise with a school or community group:** E.g. local history presentation, art exhibition, debate.
- **Research and Shared Learning Projects:** These are opportunities to work on short term projects with other u3as or outside organisations. They usually involve enquiry or research and have defined outcomes.
- **Study days and workshops:** Plan one for your own members or as part of a local network. E.g., family history day, language day, story-telling workshop, debate, quiz, music.
- **Online learning:** e.g., MOOCS (Massive Open Online Courses) are free courses on <https://www.u3a.org.uk/members-area>
- **Regional Summer Schools:** The Regional Team will have information. Most are open to any member



APPENDIX 3 THE FIRST MEETING

Suggested plan:

- Introduce yourself and the purpose of the group
- Find out about the skills and experience within the group.
- Identify the tasks that will be needed for efficient running of the group and seek volunteers willing to support these
- Agree, if the group will be aimed at beginners, improvers, advanced.
- Agree how the group will work – (e.g. discussion, instruction, presentation by external speakers, group members, visits)
- Confirm the frequency and times of meeting (see 4 weeks at a glance on website)². It is useful to identify room availability in advance to inform these decisions. .
- Identify if any members have accessibility needs that would need to be taken into account. ³
- Discuss communication pathways, taking into account GDPR⁴ and required consent to share information

² It is useful to identify availability before the meeting

³ The Equality, Diversity and Inclusion provides advice and guidance re this and is available on the [national u3a website](https://u3a.org.uk) <https://u3a.org.uk> If a member has a carer they are permitted to attend the activities. If acting in an unpaid capacity, they will be covered by the Third Age Trust Public and Products Liability Insurance If the companion/carer employed, they will need to provide evidence that they have appropriate Public and Products Liability insurance.

⁴ This is available on the website and the confidentiality agreement should have been signed



APPENDIX 4 RESOURCE

External Help and support can be found on the National Website. To access this information, go to <https://www.u3a.org.uk/members-area> and log in or register for an account.

Resources

- **Subject Advisers** are **Third Age** Trust (TAT) volunteers with specialist knowledge in a wide range of topics. Their contact details are available on the <https://u3a.org.uk> and in the Third Age Matters magazine. They provide advice on the setting up of a group of their particular subject area and the sustainability of existing group which may benefit from some re-energising
- [u3a Subject networks](#) provide a platform for u3a members to connect and come together around their interests.
- [u3a subject surgeries](#) are an opportunity to share resources and ideas, as well as access help setting up a group within a u3a, all members are welcome.
- [National u3a learning programmes](#) showcase a wide range of learning activities online for members to get involved in.
- [Networks, regions and neighbouring u3as](#) allows members to draw on experience from within the movement.
- [u3a website](#), in particular the support for u3as section
- [u3a newsletter](#) is a monthly e-newsletter, which can be subscribed to on the u3a website.
- [The TVN Regional Trustee](#) can provide an overview of the region.
- [The u3a office](#) can be contacted by any member if you have questions or concerns. Email: u3a.office@u3a.org.uk or telephone: 020 8466 6139
- **External organisations** such as museums, libraries, schools, universities.

Third Age Trust Workshops

The u3a office runs a number of online workshops to support all Trustees, including 'Interest Group Matters' which covers the information in this handbook and more. The workshops also provide an opportunity to meet other u3a members from across the country. More information about other workshop topics and how to book can be found on the <https://www.u3a.org.uk/members-area> and go to the workshop section



APPENDIX 5 MANAGING CHALLENGING SITUATIONS

Issues between Group Members

Sometimes issues can arise within a group that disrupts the group. It is good practice to resolve problems early. The SIG's Coordinator or Chair is available for advice. Where there is potential for friction it is advisable to begin by bringing it into the open. A facilitated discussion may be a useful first step. The chosen facilitator should be someone neutral and non-judgemental and not directly involved in the situation. If a resolution is not possible the SIG's Coordinator or Chair may be able to help and advice. If the situation does not resolve and becomes acrimonious it may be necessary to implement the disciplinary policy, and the Chair should be consulted who will contact u3a office for advice if necessary.

Other issues that maybe encountered:

- A member may disrupt the session and spoil the experience for other members of the group. If this is a serious problem during the session the member may be asked to leave.
- A member who is dependent on support may attend a meeting without their 'carer',
- A member may have increasing symptoms of dementia which has an adverse effect on the group

If local management is unsuccessful there should be a discussion with SIG's Coordinator

