

Group Leaders Guidance Notes.

STARTING A GROUP

Once a number of people have expressed an interest in a particular activity it is a good idea to put this in the next newsletter to attract more members. There is usually a meeting to plan what to do, where and when. Very often this will take place at the home of the person starting the group.

The following items should help to ensure that everyone attending the meeting contributes and at the end everyone is clear about what is going to happen next.

Everyone should say what they would like the aims of the group to be. People should be specific, say what they don't want as well as what they do want. Take a few notes to ensure that the different ideas are noted.

Clarify the following:

Who will lead/coordinate/organise the group	Where to meet
Maximum size of group	Times and dates of meetings
Costs to members of the group	Refreshments
What resources are needed and who is to source them.	Group's activities

- Get a list of 'phone numbers and email addresses and get people to agree to receive communication via these media. (*see section on General Data Protection*)
- Make sure that members agree to let the group leader know if they can't be at a meeting. There may be a "reserve list" for a popular group.
- Where relevant have a programme of what will take place to cover the next few meetings. This can be added to and/or amended over time. It is important to be clear who is responsible for this.

GROUP MEMBERS

Ask Group members to put ICE (in case of emergency) against selected contact numbers in their mobile 'phones, or to carry next of kin details with them. (All Brightlingsea U3A members were given a *next of kin* card when they renewed their membership for 2017-18 and new members are given the card on joining.)

Ensure everybody attending the meeting is a member and always check when any new faces arrive.

Contact the membership secretary if clarification is needed.

If you are asked whether a non-member can attend, consult the Committee first. (See hand book)

If someone doesn't attend a meeting contact them

- To ensure that they are alright
- To find out if they are still interested
- To ensure they know when the next meeting is

GROUP ORGANISATION

- Make sure you give sufficient information for group members to make an informed choice as to whether they wish to participate; this is particularly important if you are running a physical activity. You must not make the decision for them or exclude them from a particular activity.
- Remind members that, if you are doing a physically active subject, that they undertake it at their own risk.
- If you are leading walks, have a look at the walk leader checklist.(See page 4)

General Data Protection Regulation

It is important that the information you hold, especially if it is on computer, is accurate and that individual members of the group have agreed to be contacted via email and/or telephone, a verbal agreement should suffice but the question must be asked. When sending emails to more than one person use the Blind

Carbon Copy facility (BCC), this ensures that email addresses are not seen by other members of the group.

If you need the contact details of a member of the U3A ask the membership secretary who will check that that person does not mind their details being forwarded.

Newsletter

The person responsible for the group should ensure that there is an article for each edition of the newsletter giving details of the group's activities and dates of future meetings. A contact 'phone number and/or email address should be included.

The person responsible for the newsletter will generally send a reminder round asking for group news.

Web-site

Brightlingsea U3A web-site (<https://u3asites.org.uk/brightlingsea/home>) has a page for each group. This should contain a brief summary of where and when a group meets, what it aims to do and any plans for the future. Photographs of your group in action and/or of things produced by the group are a useful addition.

Speak with the web-site administrator and send him/her your ideas.

Full Groups

Please let the committee and the wider membership know when a group is full and/or has vacancies. (Including this information in the newsletter item is useful) This helps new members to see what is available.

Accidents

In the case of an accident which results in injury or damage to property, complete an accident form (copy attached) or in the absence of the form send a detailed report to the Committee, including details of witnesses.

If you think the accident is serious, call for an ambulance

Remember personal accident insurance cover is **not** provided by The Third Age Trust.

Damage

If damage is caused to property by a member of the group, take full details, as in future it may be the subject of an insurance claim.

Problem Group Members

Should you have a difficult member whose behaviour is regularly disturbing other members of the group go to the Committee for advice.

If you have a serious problem in a session, it is quite acceptable to ask a member to leave but contact the Committee as soon as possible after the end of the session and make a note of the events and action taken.

General

If appropriate to your activity consult the Advice Sheet on Licences which covers photocopying, recorded music, DVDs, videos and performance. (See page 4)

If you provide written material and use the U3A logo make sure it is correctly displayed. See the Advice Sheet which covers the use of the U3A Trademark.(See page 4)

Delegate where you can and spread the workload.

GROUPS HELD IN OUTSIDE ACCOMMODATION

If you are responsible for selecting a suitable venue make sure you consult the risk assessment checklist and the advice sheet which deals with accessibility for disabled members. (See page 4)

Don't sign any rental agreement, pass it to the Committee to deal with.

When you arrive use the venue/day of use checklist (see page 4) for reassurance that everything is in place and as it should be. If you have any safety concerns do not continue if they cannot be resolved to your satisfaction.

Make sure that you and everyone in the group know the address of the venue.

If your activity takes place in a workshop/outbuilding consult the risk assessment checklist for a workshop activity. (See page 4)

FINANCIAL GUIDELINES FOR GROUP LEADERS

An agreed petty cash limit has been reached of £50.00 to be held by the Groups.

For Groups meeting in a private house

A small payment is usually made to the host at each meeting to cover refreshment costs, if supplied, and/or photocopying and postage costs, if applicable. *Such payments do not have to be reported to the treasurer.*

For Groups meeting in a hall

If a fee is being charged for the hire of the hall this will need to be met by members of the Group. It is important that the hire fee is paid from a U3A bank account. It should therefore be agreed amongst the members of the Group the amount to be paid each session to meet this cost. This amount to be paid whether the member attends or not, but can be at the discretion of the Group Leader and the financial standing of the Group.

However, there are instances where the hire cost is relatively small and the caretaker collects the money, in those situations it is important that the Group Leader gets a signed receipt for the money.

Hall bookings

It is essential that bookings for outside accommodation are notified to the Committee. This ensures that Trustees know what is going on.

Groups to report income and expenditure to the Treasurer

As Trustees, it is very important that the Committee are aware of Groups which hold money for any length of time and the amounts involved. Groups should, if handling money on a regular basis, report their income and expenditure to the Treasurer half-yearly if their income exceeds the petty cash limit on a regular basis. This is essential to protect both the Trustees and the Group leaders.

Under NO circumstances should:

- **Groups open their own bank accounts.**
- *Groups apply for grants without prior approval of the Committee*
- *Members'/Group money be put into a personal bank account.*

This is largely as agreed in May 2017's committee meeting.

Additions and changes are in italics.

Resources and Support Available

It is strongly recommended that Group Leaders register with the Third Age Trust web-site to obtain access to the various documents.

This is free and can be done by visiting www.u3a.org.uk.

There are a number of resources available for the use and support of Groups and Group Leaders.

Approach the Committee and use the expertise of members of the group and other members of the U3A.

Use the resources available from the Third Age Trust: <https://www.u3a.org.uk/>

Third Age Matters magazine

The Resource Centre – Tel: 020 8315 0199, email:resource.centre@u3a.org.uk,

Sources, an educational journal, which is included with the direct mailing of *Third Age Matters* and is available as a download from the Members' Area of the national website.

Subject networks: there are a number of people who act as subject specialists and can advise on a number of topics and interests and put members and Group Leaders in touch with others across the country. These are listed in *Third Age Matters* magazine

Subject Advisers – see website for details – www.u3a.org.uk.

If you feel your group would benefit from having a particular item of equipment consult the Committee.

The Risk Assessment checklist and advice sheet dealing with accessibility are available from the U3A Trust website at www.u3a.org.uk/

HOME>ADVICE>INSURANCE AND SAFETY>RISK ASSESSMENT and
ADVICE>SUPPORTING YOUR MEMBERS

The checklist for walk leaders is available from the U3A Trust website at www.u3a.org.uk/
HOME>ADVICE>INSURANCES AND SAFETY>RISK ASSESSMENT

The day of use checklist is available from the U3A Trust website at www.u3a.org.uk/
HOME>ADVICE>INSURANCES AND SAFETY>RISK ASSESSMENT

The U3A logo is available at www.u3a.org.uk
HOME>ADVICE>DOWNLOADS>U3A LOGO

Copyright (photocopying, recorded music, DVDs, videos and performance)
HOME>ADVICE>SUPPORTING YOUR MEMBERS>COPYRIGHT

OTHER PUBLICATIONS Available from the U3A website

More Time to Learn, Interest Groups, Insurance.

If you need any of the above contact the National Office or contact a member of the Committee.

Equipment Owned by Brightlingsea U3A and available for use by Groups

Laptop Computer

Display Board

Leaflet Holder

Projector

DVD Player

Amplifier and Speakers

Christmas Tree and decorations

U3A Banner

Gazebo

There is also a Printer which is currently held by Sue Last and installed and connected to a computer at her home, which is used for Newsletters etc.

At the expense of the Group, photocopying can be done at, for example, *Spirals*.

Finally, remember that once a group is set up with the prior approval of your committee, you are fully protected by the liability insurance policy provided by the Third Age Trust.