

# **GROUP LEADER(S) WELCOME PACK**

**January 2021**

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## **STARTING UP A GROUP**

### **THE ROLE OF A GROUP LEADER(S):**

*Ise Valley u3a  
Group Leader(s) Welcome Pack  
January 2021*

## A Group Leader:

- co-ordinates the Group and its activities
- leads a programme preferably put together by the Group
- plans the sessions, but delegates as much as possible to group members, e.g. finding out information, booking speakers
- keeps members on the subject and keeps an eye on the time
- should be aware of people's special needs (e.g. transport needs, deafness)
- should have alternative material ready in case of absence of planned contribution.

<b>A Group Leader is NOT expected to be:</b> <ul style="list-style-type: none"><li>• an expert</li><li>• a professional</li><li>• different from members of the Group</li><li>• fully knowledgeable about something</li></ul>	<b>A Group Leader should probably TRY TO AVOID:</b> <ul style="list-style-type: none"><li>• doing too much of the talking</li><li>• commenting too much on other people's views</li><li>• allowing one member to dominate the session</li></ul>
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## GROUP ORGANISATION

- Meetings held under the umbrella of Ise Valley u3a are expected to be self financing and self-taught, as far as possible, and the Committee needs to be aware of any activity taking place. Your immediate contact on the Committee is the Group Co-ordinator.
- Members of the Committee are deemed by the Charity Commissioners to be Trustees and fully responsible for whatever is done in the name of the organisation, and for proper financial control, therefore, the leader must keep the Group Coordinator informed of any changes made in the running of the group – changes of venue or meeting dates, for example.

**\*\*It is particularly important to let the Group Coordinator know if you plan to step down or if the group is being wound up\*\***

The Group Leader is responsible for providing and displaying a description of the group at the monthly u3a main meeting and encouraging members to sign up. If the group is full, please notify the Group Co-ordinator of this, **but keep a waiting list of members who want to join.**

When, and if, the waiting list reaches the size where it is viable, in your opinion, for a new group to be formed, please pass these names to the Group Coordinator who will arrange to start a new group (possibly a member of your Group could be persuaded to take over the leadership of the new Group).

The Leader is also responsible for providing the Newsletter Editor with information about the group and this should include:

- The name of the group
- Regular meeting dates (e.g. 2nd Monday of month, 1st and 3rd Tuesday of the month),
- Starting time and where the meetings will take place.
- The newsletter is made more interesting and useful if the subject matter for a meeting is disclosed or the destination for an outing is given, etc.

One individual need not take responsibility for the whole activity of a group. Appointing a Deputy Leader is useful if the group is large; someone to keep the register, collect any money etc.

It is much better to share responsibility - members can help to prepare some part of the subject to be studied and the individual acting as telephone and/or newsletter/website contact need not be the group leader.

**It is necessary to maintain a Register of Attendance at meetings as insurance cover depends on this.** At least once a year ask to see a current Membership Card for each member. New members of the group should be asked to show their membership card when they join the group. A sample Registration Form is attached. However, this type of registration will not easily work for group activities such as trips, walks or Lunch Clubs but when they take place, a list of people attending should be taken and every effort be made to see that they are all bona fide u3a members. Once a year you will be asked to give the u3a Committee a list of group members (trip organisers can provide a representative list from their latest venture) so that we keep track of vacancies and use of the groups.

**NB: Please note that visitors (non u3a members) are allowed to attend for only 2 sessions per year and should pay the usual subscription if there is one. If they attend more than 2 they are not insured.**

**\*\*NB: Please ensure that any lists of names, email addresses, telephone numbers or addresses are kept in strict confidence, since the Data Protection Act requires us to be circumspect with members' personal information\*\***

Activity groups such as walkers, bird watchers, golf and other groups that include physical activities or visits, in or out of doors including Theatre visits, are obliged to give suitable warnings to their members (rough walking, sensible shoes, stiles, physical ability required etc,) and it is suggested that members be advised to carry the name and address of a suitable friend or relation and a list of any medications they are taking in case of accident.

## **MONEY MATTERS**

Members of the u3a Committee are deemed by the Charity Commissioners to be Trustees and fully responsible for the proper handling of funds used in the name of the organisation and for proper financial control.

Group Meetings held under the umbrella of Ise Valley u3a are expected to be self financing and all Leaders need to account to group members, and to the u3a Committee, for the way the money is spent.

**u3a's run two types of bank accounts:**

The **No. 1** account basically comes from the membership fees and can only be spent on items that benefit all members e.g. hire of main hall, refreshments at main meetings, payments to speakers etc.

The **No. 2** account is used solely for groups. All payments for trips/major activities undertaken by groups are paid into this separate account **UNDER THE GROUPS NAME**. The money is only available to be used by the one group. If the event is cancelled the money goes back to the individual group members.

**At no time is this money put into the No. 1 account. Both accounts have different bank account numbers, paying-in and cheque books**

**If you are not sure whether your group should be using the No.2 account, please ask the Treasurer.**

**NB: A discretionary grant of up to £50 is available to new groups for start up expenses if agreed by the Committee**

**The Committee is required by law to account for all monies taken in the u3a name**, therefore all money paid into a group (including refreshment contributions) and payments for theatres, coaches etc. should be recorded and in a book and once a year you will be asked to provide accounts for scrutiny by the Treasurer. If you would like the Treasurer to Audit your books even if the income is less than £100, please ask. This may be just a simple record of money incoming and money spent. Trips and Visits must of necessity be more rigorously recorded. If in doubt, speak to the Treasurer.

When meetings are arranged in members' homes, a contribution may be made by the members present towards the costs of any tea/coffee provided. Where Groups are large enough to require a hall, the cost is shared amongst the members and a suitable charge should be collected at meetings. Costs should include an element for administration, e.g. telephone calls, postage, duplication etc. **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, and any expense should be agreed by the Group before it takes place.**

**Note that a cash float should not exceed £50 but larger sums can be lodged with the Treasurer who keeps it in the Ise Valley u3a No. 2 Account, for use by the group.** Cheques can then be requested to make direct payments.

**Credit card payments will be reimbursed by Group or by the Treasurer from Group funds on presentation of a receipt or other documentation.**

**\*\*\*NB: SEPARATE BANK ACCOUNTS FOR GROUP ACTIVITIES ARE NOT ALLOWED\*\*\***

#### **Outings and Holidays:**

These activities present different problems, and advice should be sought from the Treasurer, when planning such a project.

- Collect contributions before making bookings, otherwise you may be funding careless cancellations.
- If this is impossible, talk to the Treasurer about a 'loan'.

#### **'Free' Trips when organising travel**

- One area which can lead to major problems and disagreements is that of Group Leaders going on "free trips". Group agreement should be sought so that a decision can be made on whether it should be offered to the Leader/Organiser as a 'thank you' or shared between all the travelers.

**\*\* A TRUSTEE/COMMITTEE MEMBER SHOULD NOT ACCEPT ANY SUCH BENEFIT\*\***

Advance payment of rental of premises can be arranged, as long as there is a commitment by the group members to repay this money. In these circumstances you must contact the Treasurer for advice.

### **INSURANCE**

There is a National u3a Public & Products Liability Insurance which provides public liability insurance cover for all u3a members during u3a activities. Please note the policy is not a 'personal accident' insurance, since it would have to be shown that the u3a, its agents or members, had been negligent in causing injury to the victim.

**NB: 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 a u3a member is held to be legally liable**

Both the Public & Products cover is for up to £5M, and there is a £250 excess for each and every loss. If you feel you need any further information, please contact the Secretary.

The policy is intended to cover all of us during our u3a activities but we are expected to exercise a ‘duty of care’ in a leadership situation and to act sensibly under all circumstances. Additionally, u3a members are expected to use their own judgment to be sure that they can independently undertake u3a activities. **A register of attendees should be kept for every u3a occasion.**

Note that offering a lift to another member to attend a meeting is classed as a ‘neighbourly’ action and not covered by the above.

## **ACCIDENTS**

Accidents do happen from time to time and some of these can lead to complications for the individuals concerned and the possibility of insurance claims. Should an accident occur during a u3a activity it is required that a record is retained and the Secretary notified.

- An Accident Report Form is attached and **MUST** be passed to the Secretary if it is used.
- Please also ensure an Attendance Record is kept for every group activity held.

## **VISITORS, CHILDREN, DOGS AND CARERS**

- Occasional attendance can be allowed for visitors staying with members.
- Grandchildren and dogs can be allowed on walks providing it is agreed they will not detract from the enjoyment or participation of a u3a member.
- Carers for a disabled member can attend in their capacity as carer.
- In the above circumstances, non-members enjoy the same Public Liability insurance as u3a members.

## **USING u3a EQUIPMENT**

Equipment such as the projector, amplifier etc is insured up to £1500.

## **LICENCE FOR PUBLIC ENTERTAINMENT MUSIC**

Music licenses are held by venues not by groups hiring them.

## **SOURCES AND RESOURCES**

Making and distributing multiple copies of a copyrighted document is allowed for educational purposes within the remit of the u3a who have a 'blanket' licence. The licence DOES NOT COVER maps, newspapers and sheet music (including the words). You are allowed to copy extracts from a book (5%, one chapter or one article) unless the book was published outside the UK.

A computer projector is available for Activity Group use. There is a small cost of £3 (just to cover bulb use) Please contact one of the Committee for details at least a week before the event. Training in its use can be provided.

The following learning support services are available centrally, they are free, or charged at cost, and are only a telephone call or email away. Access via [www.u3a.org.uk](http://www.u3a.org.uk)

**Resource Centre:** This has a collection of material (other than books) available for all u3a groups to borrow, free of charge, except for the cost of return postage. There are slides, videos, audio cassettes, CDs and DVDs available in many subject areas. Lists are free and available on request. When you register online, you will be issued with a user number that will allow you to search the catalogue. Loans are for a period of three weeks and may be renewed on request if not needed elsewhere. Items are sent by post with a return date. If you are able to obtain a certificate of posting when returning items, then please do so, but it is not essential.

**'Sources':** This is the educational journal of u3as included in the u3a News, which is available at the monthly meeting

**Subject Co-ordinators and Networks:** This is a subject advisory service. A subject coordinator is a subject specialist who is willing to share their knowledge and experience. They may offer all or some of the following - 'Start Up' leaflets, telephone or email consultation, networks, newsletters, study days. Contact the Subject Coordinator for details. If there is no Subject Coordinator for your subject, and you think that you could contribute in this way, please contact the National Subject Networks Coordinator.

**Online Courses:** A list of courses is available on the website The material may also be used by groups. Tutored courses are charged for and run for eight weeks with the work done via email or online. Untutored courses cost less and can be downloaded and printed for group study.

**Research Collection:** This is a reference point for

- a) research about older learners
- b) research by older learners, including u3a members, on any subject.

### **Shared Learning Projects:**

A typical Project is based on an institution, a gallery, museum etc. Members from many u3a's meet with a representative of the institution, often the Education Officer, and agree a project of mutual benefit. Timing, method and outcome are agreed. The result of this team research is presented as appropriate, which might mean orally or in written form, and to the institution or to the public. Reports on some of the projects to date can be read in 'Sources' and on the website.

### **Summer Schools:**

The Third Age Trust offers members a chance to spend four days studying in a residential setting. National Summer Schools have been run for several years and they have proved popular. The courses are usually subject based, and many group leaders attend on behalf of their group and return to them with material and a fresh outlook. They are, typically, on a college campus and the tutors are themselves u3a members. A list of courses available at Summer Schools is published each year in the preceding Autumn, both as a direct mailing, in u3a News and on the website. The cost is dependent largely on accommodation.

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## Ise Valley u3a Group Etiquette **More Enjoyment – No Aggravation!!**

The guidelines below will hopefully make for the smooth running of our groups  
for the benefit of ALL ...

Groups are only open to paid up members of Ise Valley u3a, or as a “visitor” with a view to joining or under the reciprocal arrangement with Kettering u3a.

Any member wishing to join a group should contact the Group Leader to see if there is a place available. No member should turn up at a group meeting without notice.

When a member joins a group they are required to show their membership card to the Group Leader, so their membership number can be recorded in the Group Register.

**\*\*This is important for insurance purposes\*\***

**This will also apply when subscriptions are renewed each year.**

- Any member who is unable to attend a group meeting should let the Group Leader know.
- Any member who decides to leave a group should advise the Group Leader so that their place may be available to someone else.
- If a member has not made any contact with the Group Leader for THREE meetings, they will forfeit their place in that group.
- All groups are self financing and all group members must pay their share of the group expenses.
- Any member causing disruption in a group will be asked to leave that group and possibly the Ise Valley u3a.

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*(It is suggested that each member of a group should be given a copy of this page)*

## **FOR INFORMATION ONLY:**

### **PROCEDURE FOR SETTling ANY DISPUTES**

It is to be hoped that in such an informal organisation, there will be very few instances of needing to consider procedures for any disputes between group leaders and members, but these guidelines have been developed in line with employment procedures for any such eventuality. In the event of a leader having serious difficulties with a member of their group, the following steps should be taken:

1. In order that the member is made aware of the difficulty, the group leader must discuss the areas of concern with the individual. At this time the member should also be given the opportunity to respond. The group leader should indicate the behaviour that is unacceptable and request an immediate improvement while taking account of members' point of view. If desired, the Group Co-ordinator can be present at this interview.
2. Should the unacceptable behaviour continue, the group leader will then (if they have not already done so) discuss the difficulty with the Group Co-ordinator to see whether a solution can be found. If necessary, the Group Co-ordinator will intervene at this stage.
3. If the problem remains and the leader wishes to exclude the member the Committee should be informed of this decision. They will also require the facts as to why this step became necessary.
4. The member has the Right of Appeal to the Committee.
5. Members of the committee (preferably the Chairman and Secretary) will, if necessary hear both sides of the dispute, attempt to arbitrate and, if necessary, make a fair decision on the expected outcome.

**NB: In the case of theft or other criminal offences there is an automatic right to exclude the offender and report the offence.**

**The Committee must be informed immediately.**

**ISE VALLEY u3a GROUP/LEADER MEMBERSHIP**

**Activity Group:** \_\_\_\_\_

**Leader:** \_\_\_\_\_

**u3a Membership number:** \_\_\_\_\_  
(to be seen each year for insurance purposes)

**Name:** \_\_\_\_\_

**Address:** \_\_\_\_\_  
\_\_\_\_\_

**Postcode:** \_\_\_\_\_

**Phone: (*inc code*)** \_\_\_\_\_

**Mobile:** \_\_\_\_\_

**Email Address:** \_\_\_\_\_

**Emergency contact Name:** \_\_\_\_\_

**Emergency contact Number:** \_\_\_\_\_

**Please submit details of any health problems or other information relevant to the group activities:**

**Signed :** \_\_\_\_\_ **Date :** \_\_\_\_\_

**An Attendance Register should contain the following –**

- A list of members of the group with their current u3a number.
- Name, address, phone, emergency contact details, and whether a visitor.
- This list should be given to the Groups Co-ordinator whenever changes occur.
- The meeting register should contain date of meeting; members attending and note if non u3a member(s).
- Subscription if applicable.

**EXAMPLE - GROUP MEETING REGISTER OF ATTENDANCE**      A=attended

u3a No.	Name	Date	Date	Date	Date	Date	Date	Date
Money collected	(if any)	£	£	£	£	£	£	£

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