

Wellingborough & District u3a Group Leader Handbook

Benefits to becoming a Group Leader

There are many benefits to becoming a Group Leader. It provides an opportunity not only to continue using skills from a previous working life, but also to develop new skills. Working with people from a range of backgrounds and experiences means that skills and knowledge can be shared in a positive way, leading to improved confidence and self-esteem. Facing new challenges as a Group Leader (e.g. "I have never done anything like this before") and realising that you can overcome such challenges can be very rewarding.

Strong friendships are often formed within groups and Group Leaders can take pride in seeing others develop new skills and talents. We have an example of a u3a member who wished to learn to play a musical instrument and initiated the setting up of a new group. Three years later the u3a had a band comprising 16 people playing gigs all around the county! But perhaps most importantly, there is the satisfaction of enabling the shared fun and enjoyment created within a u3a group.

The primary objective of this document is to provide practical help and advice for those considering becoming a Group Leader and for new Group Leaders - for they are the heartbeat of the u3a - without them there is no u3a! For us to continue to thrive we need more people to volunteer for this role.

We are aware that concerns have been expressed about some aspects of becoming a Group Leader and we have addressed these concerns below indicating where and how help is available. We hope that, after reading this document, those of you considering becoming a Group Leader will "take the plunge".

For those of you who are new Group Leaders, we trust this document brings together a host of information that will help you in your role.

Level of competence in the subject

If the group has a "teaching" aspect e.g. languages, maths etc. remember that you are only teaching up to your own level of knowledge. There is no need to worry that you do not have enough knowledge and understanding. Most groups have a social/organisational aspect where your own knowledge and interest is easily enough. Dealing with friends eager to learn and socialise with you will make the task very enjoyable.

The administrative workload and/or the time involved

The workload can be as simple as you wish. Remember that you will be working with friends and there will be help and advice available from experienced Group Leader mentors.

The level of computing skills required

Very few Group Leaders need significant computing skills, but where such skills are essential, help can be obtained from the Mentoring Group.

Copyright issues

Some groups may wish to copy/use/perform previously published material for their group activities. There are legal restrictions governing the use of copyrighted material. The National u3a website contains advice on the use of such material, and again help is always available to guide you through this.

Venues

Help in finding venues can readily be obtained from the Groups Co-ordinator, or some groups can be held in members' homes.

Starting a 2nd group

Some groups are "open" with no upper limit on the number of members, whilst other groups are "restricted", possibly due to a constraint with the venue. Once a "restricted" group begins to fill up to maximum numbers, the Group Leader may encourage an existing group member to start up a second group and/or a beginner's group, and could offer to provide mentoring support.

Appendix 3 contains some guidelines on how to set up an Interest Group - remember lots of help is always available.

Handling finances

We recognise that some people may have reservations about handling money received as a result of being a Group Leader. There is no need for concern. Most groups do not need to keep financial records. In those groups where financial records are necessary to comply with the requirements of the Charities Commission, then our Treasurer will ensure these are kept to a minimum, and we have several proformas to facilitate this, available from the National website or our Treasurer. Appendix 1 gives some guidance on the handling of finances. Further advice is available from the Treasurer.

Compliance with the requirements of GDPR

We are required by law to comply with the requirements of the General Data Protection Regulations, but this is a simple procedure for Group Leaders. Appendix 2 gives a simple Group Leaders guide to GDPR.

Health and Safety

Guidance on complying with Health and Safety requirements is available from the u3a National website and from the Groups Co-ordinator.

Fear of the unknown

We understand that some people may be reluctant to put themselves forward as a Group Leader, not only for specific concerns like those outlined above, but also because of a more general feeling that “it's not for me” or “I've never done anything like this before”. We have a Group Leaders' social evening where networking can take place.

The u3a is a wonderfully friendly, uplifting organisation but it will only thrive if the members contribute towards it. Becoming a Group Leader means that you are actively contributing towards the success of the u3a. Don't forget - the u3a is a cooperative organisation - not a service. Nothing gets done within the u3a without the members doing it!

Appendix 1: Handling Finances

All our financial transactions must fall within the Charity law and we are required to include details of the financial activities of groups and social events. The committee must have in place accounting records to show all the charity's transactions so our financial position can be determined at any time. We are required to make an annual return to the Charities Commission which must include details of income and expenditure from groups and social events; consequently we must ask groups and social event leaders to maintain financial records.

Not all groups need to keep financial records

If a group meets in a member's home and the only contribution from members is towards refreshments and this does not exceed 50p, then this does not need to be accounted for. Contributions towards items or materials for use in furthering the group's activities must be accounted for. Groups that meet for lunches/meals where the only expenditure for everyone is for the cost of the meal/drinks, do not need to keep financial records. If you are unsure if your group needs to keep a financial record, please discuss with the Treasurer.

Record keeping

Groups may use their own record keeping system. Some groups may have no financial transactions but, if money is expended on hiring venues, paying speakers, buying equipment, administration or otherwise funding or facilitating the group's activities, then this needs to be accounted for. As the auditor may ask to see individual group/social event accounts we must ask you to keep records up to date and to keep receipts for purchases over £5.

Some dos and don'ts

Never use your own money or credit cards; the Treasurer can make payments on your behalf. Never hold more than £100 in cash, any money above this can be deposited with the Treasurer. When collecting money for a group or social event of substantial cost, a cheque made payable to Wellingborough & District u3a is preferable to cash. Financial records need to be kept and clearly show that social events are purely social. The treasurer can provide banking facilities for social events.

Finally - if you are in any way unsure how your group should be handling its finances then please talk to the Treasurer.

Appendix 2: Group Leaders' guide to Data Protection Considerations **GDPR**

The Data Protection Policy which we have produced is available on the Wellingborough u3a website; alternatively, a copy can be provided to you on request.

It is expected that a Group Leader will hold contact details for every member of the group: name/phone number/email address, to be able to make regular contact with them, provide relevant information on group matters and allow for the efficient operation of the Group. Please take care not to divulge details of one member to another without that member's express permission. For that purpose, therefore, you should restrict emails to the group, using the **bcc** facility.

Appendix 3: Setting up a new interest group

Contact the Groups Co-ordinator, who will announce the new group at the monthly meeting and on the Wellingborough u3a website.

- Collect a list of names and arrange an initial meeting. This does not need to be at your final venue, just at a place and time convenient to all those who are interested.
- At this meeting discuss the framework of the group, ensuring the responsibilities of running the group are shared between the members. Consider practical aspects such as refreshments, collecting money for room hire, communication within the group, group attendance record etc.
- Other points to consider:
 - What would we like to do?
 - What study methods can we use?
 - Where and how often shall we meet?
 - How shall we communicate with each other between meetings?
- The Groups Co-ordinator will provide you with advice on where/how to obtain a copy of all the documents that you will need as a Group Leader (e.g. Interest Groups Details sheet, Finance records, GDPR documents, Accident Report forms etc), and, if necessary will provide you with a list of venues.

Appendix 4: Running a group via Zoom

Zoom meetings can be very effective for interests that can be home based

- Wellingborough u3a hold Zoom licences so please get in touch with Helen Grant who will assist you with the setting up of links etc
- You may want to add a camera to your Zoom functions if you are going to be demonstrating anything.
- Decide on the frequency of your meetings, dates, times and the length you would like the meeting to last.
- Create an email distribution list for your group to enable you to share the login for the Zoom meeting along with any instructions or resources using **bcc**
- Please read the GDPR policy prior to using WhatsApp or similar methods of sharing photos and tips as these require express permission from the member before you can include them.

Please ask if you need any help and we will find someone to support you

Further reading and sources of advice

The National u3a website **www.u3a.org.uk** is a source of much useful information on the u3a organisation. Documents on running an Interest Group can be found in the 'Advice' section under 'Supporting Your Members – Interest Groups', 'Group Convenors' and 'Mailings and Downloads –More Time to Learn'

The u3a publication "Third Age Matters" has an excellent page on "u3a Subject Advisors" where contact details are provided for advisors on over 60 different subjects/interest groups. The subject advisors will provide advice on how to set up a new group and will help with problems that may occur in established groups. The list of subjects/interest groups in TAM may also stimulate interest in starting a new group. All the subject advisors have a page on **www.u3a.org.uk** under Resources.

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