

WELLINGBOROUGH & DISTRICT U3A HANDBOOK FOR GROUP LEADERS.

The primary objective of this document is to provide practical help and advice for 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 a mutual organisation and operate cooperatively to achieve the activities and outcomes of our u3a. To this end we need to work together, treating each other with dignity and respect, in a mutually satisfactory manner which is to the benefit of us all.

For those of you who are Group Leaders, or planning to become one, this document brings together a host of information that will help you in your role.

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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.
- It offers an opportunity to work with people from a range of backgrounds and experiences, meaning that skills and knowledge can be shared in a positive and enjoyable way.
- Shared experiences lead 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
- Group Leaders can take pride in seeing others develop new skills and talents.

Responsibilities of a group leader

- Be responsible for booking a venue
- Remain with the group during the sessions particularly where it is a sports activity, and/or ensure another member has been delegated to take responsibility if you are unable to be with the group for any reason.
- Nominate another member to support/lead the group in your absence
- Where the activity is an organised visit, ensure that all members have registered contact information [including yourself]. Should problems arise, keep a list of members and guests on the trip with relevant contact details. [share list with committee members]
- Ensure each group member has an opportunity to contribute.
- Delegate responsibilities/tasks where appropriate
- Keep a register for each session, in which any guests are named/included
- Ensure guests have joined the u3a after the two complimentary sessions or no longer attend the group
- Communicate with members between sessions when necessary.
- Hold contact information for each member + information of their next of kin,
- Maintain General Data Protection Regulations protocol [GDPR]

What being a Group Leader Means

Different groups will have different requirements and needs depending on their focus. 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. If there is a need for a more experienced level of knowledge then it may be that a tutor could be engaged. It may also be that there is information centrally via the national u3a that groups can access to facilitate and support your sessions.

Many groups have a social/organisational aspect where your own knowledge and interest, or that of others in the group is easily enough.

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

The admin workload varies from group to group. It may involve taking a register, keeping records of monies taken or paying for a venue, for example.

Remember there will be help and advice available via the national website, committee or more experienced group leaders.

Some groups may need 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. Wellingborough u3a does pay for the right to make copies but please check the main national website for further information

Different venues are available depending on the activity and number of members in a group. There is a list of venues currently used that can be requested from the Groups Co-ordinator. Other venues can be researched. Where appropriate groups can be held in members' homes or via zoom.

Guidance on starting up a new group can be found in [Appendix 3](#).

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. Many 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. You will be asked annually by the treasurer for a financial report and must respond even if there is nil return. **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 GDPR, but this is a simple procedure for Group Leaders. [Appendix 2](#) gives a simple Group Leaders guide to GDPR

Insurance

The Third Age Trust nationally organise insurance cover for all affiliated u3a's activities which includes Public Liability Insurance. An overview of the insurance policies provided by the Third Age Trust is on the Wellingborough u3a website. Although we have a legal duty to take reasonable steps to ensure the health and safety of our members, group members are expected to check their own individual risks before taking part in an activity. The u3a insurance policies are intended to protect the u3a and those who run individual u3as, such as Trustees and Group Leaders. They do not provide standard personal or accident insurance to members participating in activities.

Every public venue holds their own Public Liability Insurance which we can request.

Health and Safety

Our Health and Safety Policy is available the Wellingborough u3a website. As part of Health and Safety you will need to complete a risk assessment which can be found on the website. To assist you, these checklists have been broken down by activity type and have already been filled in with the most common risks, so all you will need to do is add any that are specific to your activity/venue and identify the mitigations.

Problem Solving

Sometimes issues can arise within a group that disrupt the smooth running and can spoil the enjoyment for everyone. Don't leave a problem too long before trying to resolve it. Talk to the Groups Coordinator if you are unsure how to resolve the problem or just want someone to explore options with.

Issues between Group Members

Where there is potential for friction it is advisable to begin by bringing it into the open. Either you or another person could try to facilitate a discussion either with the members concerned or with the whole group, but it is important that the facilitator remains neutral and non-judgemental. If you cannot reach a resolution speak to your Groups Coordinator or a member of your committee. If a situation does not resolve and becomes acrimonious the committee may need to implement the complaints policy.

Complaints procedure

In the rare case that a complaint is made and if a dispute arises, it can hopefully be resolved amicably and respectfully within the group.

The procedure to follow is noted below. Full information can be found on the Wellingborough u3a website.

- Complaint should be put in writing to the Group Co-ordinator.
- Group Co-ordinator to discuss issues with all relevant parties and document all communications.
- Ascertain whether the parties involved are willing to resolve the situation informally.

- Establish how/if a reconciliation can be achieved.
- If this fails or parties are unwilling or unable to find a solution then a designated person with mediation skills will aid the group leader to mediate between those involved in a face to face meeting.
- If mediation fails then a formal investigation may follow to ascertain whether disciplinary measures are required or in the case of a very serious matter whether involvement from local network or national office is required.

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 and these details can also be found on the website. 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.

Fear of the unknown

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!

Finally, Learn, Laugh and Live! together!

Appendix 1

Handling Finances

All our financial transactions must fall within legalities of 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 and the only contribution from members is towards refreshments, then this does not need to be accounted for. Contributions towards equipment 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 Do's and Don't's

Where possible avoid using your own money or credit cards as 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 bank transfer to the Wellingborough & District U3A is preferable to cash or a cheque as both of these now create charges for each individual deposit. Please ask the Treasurer for the bank details. 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 main 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

Starting a U3A New Group/Interest Group

The first steps

- Contact the Groups Co-ordinator and agree the development/focus/aims of your group and, if appropriate, possible venues.
- The new group or second group can be announced at the monthly meeting, in the monthly newsletter and on the Wellingborough u3a website and anyone interested can then contact the Groups Co-ordinator who can pass on the contact details to you to collate.
- 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.
- Consider whether or not you would like/need some input from an experienced group leader. There may be an existing national subject adviser who can support with ideas for the development of the group – check on the national website www.u3a.org.uk
- You might want to consider contacting neighbouring U3As to see if they have a similar subject group and then talk to their group leader to get some first-hand knowledge. It may be that you could sit in on a group meeting.
- 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.
- Prepare a risk assessment for the group. Consider whether there are any risks that might occur as a result of the group's activities and, if you identify any, talk to the Groups Coordinator who will advise you on risk assessment procedures. If you're unsure or want further advice speak with your Groups Coordinator, Committee or National Office.

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 can 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. Group Register sheet, Finance records, GDPR documents, Accident Report forms etc), and, if necessary, will provide you with a list of venues.

The first meeting – Recommended steps to take at the first meeting:

- Introduce yourself and the purpose of the group as you see it.
- Ask about the skills within the group.
- Agree the tasks that need doing to run the group and who is willing to support these – for example, who is willing to help with the programme or keep the register.
- Agree, if relevant, the level that the group will be aimed at – beginners, improvers, advanced.
- Agree how the group will work – discussion, instruction, presentation etc. [This may well evolve as the group develops].
- Agree when and where the group will run.
- Identify any accessibility needs that group members may have and how these might be addressed.
- Agree the costs for running the group and what members will pay.
- Confirm with your u3a Treasurer how monies will be handled and reported.
- Discuss how group members will communicate with each other bearing in mind data protection concerns.
- Agree some ground rules e.g. a) Be punctual, b) Listen to each other, c) Allow others to speak, d) Let someone know if you are unable to attend, e) Agree to disagree amicably and be respectful to other group members, f) Every contribution matters.
- Feed back what was agreed at the first meeting to your Groups Coordinator to finalise arrangements.
- Agree when it can be added to the Groups Page on the website and the information to be included.