



THE UNIVERSITY OF THE THIRD AGE



Registered Charity Number 1164952

HIGHAM & RUSHDEN

Guidelines for Group Leaders



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Higham & Rushden U3A

GUIDELINES FOR GROUP LEADERS

1. **Introduction**

This is a general guide for those who lead U3A interest groups, known as Group Leaders (GLs).

The running of a group and its administration will vary greatly, depending on its needs. These general guidelines are intended to help GLs address issues likely to be faced when starting a new group or taking over the leadership of an existing group. If the guidance is not sufficient for your needs or does not address every issue then don't hesitate to speak to the Groups Coordinator (GC) or one of the Useful Contacts listed at the end.

Group Leaders should be participating in Beacon, the online membership management system introduced nationally about 2 years ago and which Higham and Rushden U3A has now joined.

If there are any omissions or errors that affect your group, please advise the GC. These will then be considered for inclusion when these notes are updated. And finally, thank you for volunteering.

2. **Group Leaders (GL)**

GLs are vitally important to the success of U3A. A U3A is a collection of interest groups and without GLs the U3A itself couldn't really exist. Being a GL always involves a certain, usually modest, amount of organisational and administrative work, but should give satisfaction and enjoyment.

On a personal basis, no GL should feel that it is an open-ended commitment – that you are there forever. If you enjoy it so much that you want to go on indefinitely then that's fine, but running a group for, say, three years is a splendid effort and well deserving of a break. And once you cease getting some enjoyment out of it, it is time to stop. But please let the GC know of this in good time so we can try to find a replacement, and please be prepared to help us do this.

Nor should GLs think that the running of a Group is entirely down to them. They can and should enlist the help of other members of the Group. In larger Groups and especially those that require planning, for example trips and outings or the taking of money, the GL should encourage other members to help share the workload.

3. **The Groups Coordinator (GC)**

The role of GC is to support GLs in the running of their Group and to assist in the forming of new Groups.

Any member who wishes to start a new group should, in the first instance approach the GC.

The GC is the first person a GL should consult if they have any questions about Group matters. The contact details for the GC are given at the end of this booklet under Useful Contacts. It is particularly important to inform the GC if a group is being wound up or if a GL plans to step down.

The GC will provide advice and help on or will refer the GL to someone who can. GLs must keep the GC informed of any changes made in the running of the group – changes of venue or meeting dates, replacement of a GL for example, so that Committee members and central records such as Beacon, the Website and Newsletter can be updated.

4. **The Third Age Trust**

The Third Age Trust (TAT) is the parent organisation for all U3As and is a Registered Charity (No. 789.768.09)

The TAT is an excellent source of information and material which you may find useful in your group activities. It publishes a Newsletter, Third Age Matters, four times a year, and has a website, www.u3a.org.uk, which is well worth visiting.

5. **Higham & Rushden U3A (H&R U3A)**

The H&R U3A is a part of the TAT but we are registered as a charity in our own right. Registered Charity Number 1164952.

H&R U3A is run by an elected Committee in accordance with its own written constitution. All elected Committee members are automatically deemed to be Trustees of our U3A and must comply with the terms set down by the Charity Commission for the proper management of assets. The elected committee comprises the officers - Chairman, Vice Chairman, Secretary, and Treasurer. These are assisted by elected committee members including a Membership Secretary and Groups Co-ordinator. The Committee (maximum of 12 members under our present constitution) alone is responsible for the administration of your U3A and meets on a monthly basis. Beacon has been adopted to enable consistent handling of all Administrative matters.

6. **Recruiting Members**

There are many ways in which members can be recruited for a Group:

- by promoting the idea in our Newsletter,
- on our website,
- at our monthly meetings.
- Trifolds in libraries

7. **Membership Rules**

Groups are open to members of Higham & Rushden U3A, and other individuals subject to certain rules and requirements. The position can be summarised as follows – Group membership is open to:

- Any paid-up member of H&R U3A
- Any member who has taken out dual membership of two (or more) U3As is entitled to belong to any Group at any of the U3As they have joined
- The practice of allowing non-members to attend Interest Groups for taster sessions is not permitted.

Trips and outings are primarily organised for members of H&R U3A. If there are spare or unfilled spaces members of other U3As may be invited to participate.

8. **Group Etiquette**

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

There are a few simple rules regarding the conduct of members that have been set out in the document “Group Etiquette” that is available to download from the website.

GLs should ensure that all members of the Group are familiar with this document.

9. **Finding somewhere to hold Meetings**

Small Groups often hold their meetings in the GLs home. If this is not convenient, or the Group is too big, rooms or halls can be hired in the area. The GC can provide a list of external venues and provide advice on choosing the most appropriate venue for your needs. Note that room hire charges are the responsibility of the Group. A list of potential venues in the local area is available on the H&R website.

10. **Running the Group**

A Group may be run as the GL and members wish, within our constitution, but the following advice – distilled from quite a lot of experience – may be useful.

The role of the GL will vary according to the type of group being run. In some cases, GLs follow a structured plan that might involve some degree of guidance and tuition, e.g. languages, whilst in others the role is that of co-ordinating events and people, e.g. outings, theatre visits.

The GL is responsible for the content, duration, and administration of the Group’s meetings. The venue, frequency and timing of meetings, and other housekeeping details should be discussed and agreed by the Group.

GLs should not feel that they have to do everything themselves. In larger Groups, the GL should appoint a deputy leader. This person will be the point of contact for the Committee and Group members and responsible for running Group meetings, in the event of the enforced absence of the GL. Through the GC, the Committee need to know the name of this

designated deputy. This deputy could also be the person acting as Group registrar and/or Treasurer where required.

The GL should engage Group members as much as possible in whatever activity is being practised. Most people like to take an active part rather than a passive part in what is going on. This can be as simple as conducting a vigorous question and answer session at the end of a talk.

In some study Groups, there may be a range of skills or expertise from novice to skilled/experienced member. The GL needs to pitch the meeting content so that it is not too advanced for beginners to feel lost yet does not bore the experienced member. Alternatively, meetings can be based on separate streams or novices can be given extra tuition. Special attention in this respect also needs to be given to pacing the introduction of a new member into the established Group.

GLs should from time to time reflect on the quality of the experience being offered to those attending their Group meetings, perhaps aided by an appropriately worded questionnaire.

When a person joins a Group, they must be asked to provide proof of membership by showing a valid membership card. It is an insurance requirement that all members of the Group are members of our U3A. GLs should also check current membership cards at the first Group meeting after the AGM. The membership secretary can confirm current membership if necessary.

All members of H&R U3A are encouraged to carry details of an emergency contact number on their person or recorded on their mobile phone. This information is generally known as ICE – In Case of Emergency information. Having such information to hand enables easy contact with someone such as family or friend in the event of an emergency.

A Register of Attendance at all meetings should be kept, which should include membership numbers as shown on membership cards - an example is available to download from the website. Where the Group meets at a venue it is recommended that the form should include the postcode of the venue to aid location by emergency services.

The Group size will vary depending on the activity and the venue. It is necessary to strike a balance between having sufficient members present for a successful and satisfying activity as against having too many attendees with a loss of quality or participation. Once a Group declares it is full the GL must inform the GC, together they should consider the possibility of establishing another group.

All Groups are self-financing; all members must pay their share of the Group's expenses. (See Section 12)

Death or illness: It is the responsibility of the Group to decide what action is to be taken in the event of illness of one of its members e.g. sending a card. In the case of terminal illness, the Chairman and GC should be informed.

In the event of the death of a Group member it is again the Group's responsibility to decide what action should to be taken. It is, however, important that the Membership Secretary is informed in order to avoid any communication being sent that could cause further distress to the relatives of the deceased.

The GL should consider any possible benefits from giving the Group and themselves breaks during the year. Most Groups meet once a month, if the meeting is late in the month, for example, then those Groups could skip the December meeting to concentrate on enjoying the Christmas festivities. Some Groups take time off during the summer.

11. **Equipment and Assets**

A Group may have need of equipment to operate, for example a photographic Group may have need of projector to enable images to be displayed on a screen. A Group that has visiting speakers e.g. Local History might also need access to a projector. Groups involved with music and dancing will need equipment to enable the playing and amplification of music.

Capital Assets are those with a value exceeding £100. H&R U3A will purchase such assets from central funds where there is deemed to be a need and there will be a benefit for the membership. Any such assets are regarded as U3A property and are thus covered under the insurance arranged by the Third Age Trust. Groups should not purchase Capital Assets without seeking permission of the Committee (see below)

The Committee should be approached with a request for the purchase of such equipment using the appropriate form.

Once such equipment has been purchased the Group is responsible for its safe keeping. The Group must make arrangements for it to be safely stored when not in use and made available to Groups when requested.

Groups may ask the Committee to purchase a Capital Asset for their sole use. The Committee will consider the request and decide if it is prepared to agree to the request.

If the Committee does not agree to the request then the Group may wish to raise funds from their members and purchase the Capital Asset themselves. The Group may only do this with the prior permission of the Committee.

However, once purchased the asset must be made over to H&R U3A and be logged as a U3A asset. This must be done in order that the asset receives the protection of the insurances.

The GL is responsible for ensuring that the equipment is logged on the H&R Asset Register. This is important for insurance purposes. Electrical equipment must be presented for annual PAT Electrical testing. It should be noted that electrical items such as extension leads are perhaps the most common cause of electrical accidents such as fire and electrocution. Groups should not use their own personal extension leads. If there is a need for such a lead then it should be purchased by U3A, added to the Asset Register and subjected to electrical testing each year.

12. **Financial Matters**

All Groups must be self-financing. This includes any start-up costs. This is the way most U3As run their Groups and is the only sensible way to do it, given that the costs involved can vary widely between Groups. It is not permitted (under Charity Commission guidance) for Groups to be subsidised or supported out of membership fees paid by the entire membership. The only exception to this is the purchase of equipment which must be arranged centrally via the Committee.

The golden rule is that the GL must not end up out of pocket. GLs should never open a bank account nor take money from Group members and place it in their own account. Ideally cash handling should be avoided but if this is not possible receipts should be given. GLs should approach the Treasurer for advice and guidance on financial matters.

If the Group meetings are held in a hired room then at each meeting the GL should put out a Register of Attendance and contribution sheet so that each member can sign in and pay some fixed amount of money to cover the hire of the room, the provision of any refreshments and the cost of any incidental expenses, such as postage, the leader may have incurred. If the GL has to pay room fees in advance, then he/she may request Group members to also pay in advance. If meeting in members' homes a small contribution per member for refreshments is suggested.

To cover any start-up costs, the contributions can be increased for the first meeting or two and this should be explained to the members.

Group leaders should hold no more than £100 (up to £150 for large groups with additional expenses) of the Group's accumulated funds, depositing any excess with the Treasurer. If a surplus is slowly accumulated then this must be distributed amongst Group members in some way. This is usually done by occasionally having a meeting free of charge. Note that as members of the Third Age Trust, a registered charity we are not allowed to make donations to another charity.

There are financial and other risks involved when groups organise visits, holidays, theatre trips, etc and the U3A has produced guidance to help organisers to manage and minimise the risks. U3A policy is that the

whoever is organising the trip needs to get those who plan to attend to pay in advance with cash or a cheque payable to "Higham & Rushden U3A". This money should be lodged with the U3A Treasurer who will pay the venue, coach firm etc with a U3A cheque. Receipts must be provided for all payments made to a Group.

GLs must not handle payments for trips through any other bank accounts.

The paper trail of money in and out must lead back to the Treasurer, who has the overall responsibility for money in our U3A.

For a small Group, with relatively limited expenses, the recording of the financial affairs need be nothing more than keeping the contribution sheets mentioned above. A Group with rather more significant expenses needs to be a little more formal, because the members have a right to know where the money is going. The GL will be called upon to submit his/her Group's Financial Report or annual summary of income and expenditure for the year finishing on August 31st to the U3A Treasurer in September before the AGM. A form can be downloaded from the website.

The reason for such controls is that the U3A Committee members are also our U3A's Trustees and are, technically, ultimately responsible for such accounts therefore they need to be aware of what they are committed to. We successfully bid for and received funds from the National Lottery, which were used to purchase equipment.

13.

Resources for Group Leaders

Learning Support. The Third Age Trust seeks to provide such support to the U3As in all their activities, notably support for their self-help learning. This learning support is coordinated by the Standing Committee for Education (SCE), whose role is to explore and articulate Third Age Learning. It has in recent years created several support services for use by U3As around the country.

Key elements of this support are as follows:

The Resource Centre: This comprises a collection of non-book materials such as slides, audio cassettes, CD-ROMS and DVDs on subjects studied by U3A members. This material is made available for short loan periods of three weeks to any Group Leader or member who would like to use them in support of their study.

The loans are free, as are the outward postage costs and the borrowers are only required to pay the postage for returning the item at the end of the loan. The library of items in the Resource Centre has been built up during the last few years mainly with the aid of lottery grant funds. A catalogue of these items is available from the Resource Centre: [Click Here](#)

Open Learn: The Open University has put over 2500 hours of study material on the web, covering over 400 units in 12 topic areas and allows free access. Units take between 4 and 16 hours of study. U3A members can study them individually or as part of a group [Click Here](#)

SOURCES: This is an educational bulletin, published by the Third Age Trust three times each year (included with copies of Third Age Matters). It seeks to provide guidance to U3A members on how self-help learning is undertaken by other U3As and advice on learning and sources of information more generally. The magazine is also an important forum for the exchange of ideas on Learning Support and can be viewed online: . (<http://www.u3a.org.uk/members-area/publications.html>)

National Subject Advisors. For many of the subjects studied by U3As there is a National Subject Advisor, who is a subject specialist willing to share their knowledge and experience. They may offer a range of assistance including start-up leaflets, newsletters, study days, email consultations, etc. and information volunteered by GLs in other U3As. These individuals can be accessed via the U3A national website. [Click Here](#) (www.u3a.org.uk/log-in.html)

Study Days. When resources permit, Study Days are organised on themes enabling participants from U3As around the country to study aspects of a subject in depth.

Summer Schools. Each year the Third Age Trust organises one or more Summer Schools, which give U3A members the opportunity to explore a chosen subject in some depth while enjoying a residential experience.

U3A Online. This is a co-operative activity organised with the Australian and New Zealand U3As and includes online learning courses specially written by U3A members are. Both tutored course and downloadable self-teaching materials on a variety of subjects are included. [Click Here \(www.u3aonline.org.au/courses\)](http://www.u3aonline.org.au/courses)

14. **Communication**

GLs must ensure that the GC is kept informed of any significant changes within the Group, for example venues, dates/times of meetings and changes of GL. Beacon should be used where possible to ensure that other GLs are aware of changes.

Many GLs use email to communicate with Group Members between meetings. Members who do not have email can be asked to supply some SAEs so that they can be sent relevant group information.

GLs have several means of communicating with the overall U3A membership:

- Beacon
- Newsletter,
- Website and
- Monthly meetings.

The Newsletter is published each month and is accessible to all members via the Website and is available in hard copy format (limited numbers) at monthly meetings for those without email access.

GLs are asked to provide their written content to the Newsletter Editor in good time to meet the deadlines. The Editor's contact details can be found on the website.

There is space on our website to describe each Group's activities, list forthcoming meetings, display photographs and generally promote their Group. Any material for placing on the website should be sent to the Webmaster (see Useful Contacts Section 21)

GLs have an opportunity to promote membership of their group at monthly meetings by manning one of the tables provided and/or can make an announcement to members. This is especially useful for events such as trips and outings.

Group Leaders may wish to publicise their activities more widely, for example in local magazines and newsletters. Before doing so they should liaise with the Publicity Committee Member. (see useful contacts)

The national U3A magazine, Third Age Matters, is always looking for stories. Contact the Publicity Committee Member if you think your event or activity would be of wider interest.

15. **Group Leaders Meetings**

Normally there are two GLs' meetings each year. In November, there is a coffee morning and in May a meeting followed by a thank you lunch. These events give GLs an opportunity to raise issues for discussion with Committee members and other group leaders. It is also an opportunity to get to know other GLs, discuss best practices and share experiences.

All GLs are urged to attend and if they cannot be present should send a deputy. It is at such meetings that the Committee seeks to sound out the views of GLs, to determine that all is well with Groups and reassure themselves about the Groups, their operation etc. Attendance at these meetings is invaluable, both for GLs and the Committee.

16. **Health and Safety**

A GL needs to be aware of the Health and Safety regulations of the venue in which the group meetings are held, but in practice this usually means nothing more than making sure the attendees know where location of fire exits, the alarm sound or signal etc are.

Group Leaders are also reminded of the requirements for electrical testing set out in Section 11 Equipment and Assets.

17. **In Case of Emergency (ICE)**

It is good custom and practice for all U3A members to have with them details of who should be contacted in case of emergency or accident.

18. **Vulnerable Persons**

H&R U3A would not wish to discriminate against vulnerable persons, should not do so on moral grounds and is legally barred from discriminating on the grounds of disability.

This is a complex subject and has the potential to give rise to difficulties for both Groups and U3A.

If a vulnerable person approaches a Group Leader asking to join the Group the matter should be passed immediately to the Groups Coordinator who will arrange for it to be discussed at the next Committee meeting.

19. **Insurance**

Every member of every U3A in the country is covered by an insurance policy taken out by The Third Age Trust.

Whilst engaged in any U3A activity members are covered by insurance policies arranged through the National Office. A summary of the insurance cover is held by the Secretary, can be found on our website and the National website.

Public Liability Insurance insures any U3A member against compensation claims arising from injury or damage to property suffered by a third party, for which a U3A member is held to be legally liable. The Third Age Trust has circulated to all U3As a set of Frequently Asked Questions (with Answers) about the insurance, and a copy of this can be found on the National website.

All members who have paid their annual subscriptions that includes the Capitation Fee are covered by this insurance. Visitors to monthly meetings are also covered, on the understanding that such visitors make few visits.

20. **Accidents**

One consequence of the insurance referred to above is that in the event of a member of your group suffering an accident you must complete an Accident Report Form a copy of which can be found on our website. Completed forms must be returned to the Secretary as soon as possible.

Accidents: Any incident which results in an injury to a member or damage to property during a Group meeting must be recorded on Accident Report Form (available on the H&R website). The Form must be completed as soon as is reasonably practical following the event and returned to the Secretary.

Completion of such forms will ensure that an accurate record is kept should there be further consequences, either medical or legal. If an incident occurs in premises other than a member's home the appropriate official, e.g. landlord or safety officer, must also be informed.

21. **Copying**

Under UK copyright law one is only allowed to copy an insubstantial amount for personal use, for the purposes of private study or non-commercial research. But the law does not define insubstantial. There is no magic figure applied, as each case is to be viewed on the basis of the perceived importance of the extract rather than simply the quantity. A Copyright Licensing Agency (CLA) licence paid for and supplied through HQ for all U3As allows multiple photocopies from books, journals and magazines for study purposes. Extracts can be up to 5%, one chapter or one article, whichever is the greater.

NB. It does not allow multiple copies of maps, charts, newspapers or printed sheet music including the words. Licences for copying newspapers can be purchased from the following organisation if you feel you need them: -

Newspaper Licensing Agency - 01892 525273 www.nla.co.uk

Maps: A licence has been purchased from Ordnance survey to allow the printing of maps.

Music: There is no blanket licence available for multiple copying of sheet music; this is always illegal unless it is no longer in copyright. If you would like help and advice on obtaining copyright clearance you can look at

Frequently Asked Questions on The Music Publishers' Association website www.mpaonline.org.uk or contact them on 0207 580 0126.

There is also some free sheet music available on the internet at www.cpd.org.uk and this will give you links to other useful sites.

Digital Images: There is a common misconception that anything on the internet is in the public domain and therefore free to use. A work only falls into the public domain once copyright expires. It may be publicly accessible but it is not necessarily freely available. Any use should be acknowledged.

Recorded Music: The PPL licence supplied by The Trust gives U3As permission to play recorded music in public.

DVDs/Videos: The Third Age Trust has no blanket licence arrangement with film copyright holders or organisations. Interest Groups are usually covered by an exemption in the Copyright Law which allows the use of videos or DVDs for educational purposes. Details are set out in Fact Sheet P - 01: UK Copyright Law dated 27th November 2009, which can be downloaded from the website of the UK Copyright Service www.copyrightservice.co.uk).

It lists allowed activities (under the Fair Dealing Exemption) i.e. performance, copies or lending for educational purposes. This exemption does not allow the viewing of films for entertainment.

MPLC 01323 649647 www.themplc.co.uk

PVSL 0207 9845957 www.filmbank.co.uk

Each company licenses films from different Hollywood studios and independents so some U3As may wish to purchase both. We do not believe that H&R U3A will need a commercial licence.

Performance - PRS Licence

This covers the use of the actual lyrics and composed music in any public performance of music. It is the sole responsibility of the proprietor/manager of the premises you are using to have a licence arranged.

Further information can be obtained from the UK Copyright Service: www.copyrightservice.co.uk

22.

Useful Contacts

Groups Co-ordinator: Jenny Carr
Tel: 01933 274880
Email: hru3agrpcord@outlook.com

Publicity: Barbara Wiggins
Tel: 01933 651084
Email: geoffreywiggins123@btinternet.com

Treasurer: Jean Mole
Tel: 01933 4626608
Email: peterandjeanmole@btinternet.com

Webmaster: Jim Morrison
Tel: 07403 557556
Email: Webmaster@highamandrushdenu3a.org.uk

Newsletter Editor Peter Turner
Tel: 01933 314425
Email: u3a.editor@btinternet.com

As details can change it is advisable to check the website. GLs who do not have access to the internet should contact either the Groups Co-ordinator or the Webmaster. The starting point for most queries relating to Groups will be the Groups Co-ordinator.

Useful contacts and documents are on our website
<http://www.highamandrushdenu3a.org/>

Officers and Committee members are listed under the “Our Committee” tab on the website. There is also an annual planner with useful dates including when committee meetings are held.

The following documents can all be downloaded from here: [Document Downloads](#)

Accident Report Form:

Group Meeting Register:

Group Etiquette:

Group Leaders Financial Report:

Possible Meeting Rooms:

