

West Wolds u3a Group Leaders Guide

Introduction

These notes are intended to help and encourage you to lead an interest group (i.e. become a Group Leader GL). Becoming a GL need not be very time consuming. It is not difficult and can be very rewarding. Furthermore, you do not have to be an expert on the subject. All that is needed is a desire and ability to learn.

West Wolds u3a offers a mentoring service to help set up and run a new interest group and give help to GL's. Comprehensive advice sheets on policies and procedures are available on the West Wolds u3a website. (See homepage then tab 'Info' then 'Information & Guidance for Group Leaders'). The National Office website (See the direct link on West Wolds u3a 'Info- Useful Links' website page) also offers a network of over 50 national subject advisers who provide advice and support.

There are however, some things you really should do!

1. Starting a new Group

- a) Any member wishing to start an Interest group should contact the Group Co-Ordinator (GC) who will notify the Committee to request that they sanction it. A notice/flyer/poster can then be circulated, via all available communication channels, asking for expressions of interest. This will help gauge the level of interest and to decide the way forward.
- b) If you do not wish to use your home as a venue and are not aware of a suitable venue, contact the GC who will suggest a room for your meeting.
- c) Be welcoming to potential new members and try to avoid the situation where your group is full and you have a waiting list. If it gets too large to fit into your current venue and have then please discuss with the Chairman and/or GC about splitting the group or changing the venue.

2. Advertising

- a) Maximising the membership of your group or advertising its purpose and activities can be achieved using the monthly newsletter, Facebook page, the West Wolds u3a website and at the monthly meeting in The Festival Hall etc. Remember the more you advertise it the more members will attract.
- b) Periodically we "Showcase" Interest Groups at the monthly meeting in The Festival Hall when you can "Lay out your stall". The object of which is to give a flavour of what your group is about and to hopefully sign- up new members.

3. Attendance

- a) Before your first meeting ensure that the group members have your contact details and you have theirs, so that you can be informed of any group member attendance cancellations or you can inform members of any changes due to personal circumstances or weather conditions etc. The GL should also have a group member's 'In Case of Emergency' (ICE) contact details should they be needed at any time.

- b) At your first meeting, make sure that everyone is a paid-up member of the West Wolds u3a. This is important, as all those attending should be covered by the u3a insurance with its Public Liability provision.

It is recommended that you keep an Attendance Register. This will help you monitor the size of the group or long-term non-attendance, so that any spare places can be offered to new group members. If a waiting list develops, please let the GC know so that they are aware of demand.

- c) A non u3a member may attend three group meetings as a visitor but if they want to continue attending must take out a West Wolds u3a membership.
- d) In the event it becomes necessary to ask a group member to leave the group the GL should first consult with the Committee.
- e) Every January please let the GC have an up- to- date list of your group members. Please ensure that the GC is kept informed of any changes to your group regarding: time/location of the group meeting, date held, change of GL or ceasing to operate.

4. Beacon (IT System)

- a) Beacon is the u3a movement's integrated membership, groups, finance and mailing system. The system is very simple to use, and help is available from our Beacon Administrator. GLs are encouraged to use it. The Beacon Administrator will give a short training session where you will be given a password at the same time.
- b) Once you have your password, you will be given limited access to Beacon. This will enable you:
 - i) to select your Group members to set up your group and have access to their details – e.g. phone number, address, emergency contact etc.
 - ii) to delete members if they leave your group.
 - iii) to assign or change the group leader
 - iv) to be able to email your Group Members individually or as a group.
 - v) to keep a simple record of payments made by and for the group members
 - vi) changes to group member's details will need to be amended by the Membership Secretary.
- c) Data Protection, please respect the privacy of members and protect any personal information entrusted to you. (See West Wolds u3a website Data Protection Policy for full details)

If possible, avoid downloading members personal details to your own PC/phone/tablet. If you do, then please remove it when it is no longer needed.

When sending emails to your group from your personal email account please use the 'Blind Copy facility ('BCC') to ensure that members' email addresses are not shared with everyone. This is not necessary if you are using Beacon to email your group as members email addresses are not shared.

5. **Finance**

- a) As a Group Convenor you should follow the West Wolds u3a financial policies and procedures when forming and running your activity group. The policies and procedures are listed below. They can be found on the West Wolds u3a website, home page, tab 'Info – Information & Guidance for Group Leaders':
 - Group Finance Policy
 - Group Funding
 - Group Annual Finance Summary Form
- b) All groups must be self-funding.
- c) The West Wolds u3a is a charity, any money collected should only be sufficient to cover the cost of the running of the group and not to generate a profit.
- d) You are not expected to subsidise your group. The cost of running it (e.g. venue hire, speaker fees, stamps, photo-copying etc.) should be met from the meeting entrance fee (subs). Consumables such as paint, card sewing material etc. should be paid for by members themselves, collectively or individually.
- e) If you are meeting in your own home and supply coffee/tea etc. you may ask for a reasonable amount from each group member to cover its costs.
- f) As a GL you may request funding for equipment from the Committee. Each request is dealt with on its merits and must be approved before purchasing as retrospective requests will not be considered. The West Wolds u3a already owns a lot of equipment, so please check what is available before applying. All electrical equipment is PAT tested annually and is arranged by the Treasurer.
- g) Please submit a balance sheet to the Treasurer, not later than 31st August, if your group has received any income and/or incurred any expenditure during the previous 12 months.

6. **Group Leaders Meeting**

Annually a meeting is held when all the GL's can get together to exchange ideas, discuss any issues which may have arisen and look for solutions to any common problems. If you are unable to attend you are most welcome to nominate a deputy to represent your group.

7. **Health & Safety and Risk Assessment**

- a) The u3a insurance company expects u3as to take reasonable precautions through risk assessment checklists, and they use these as a basis for any claims made. For most activities, a checklist is sufficient. The more hazardous the activity, the more comprehensive the risk assessment checklist should be. You can download Risk Assessment Checklists, and Incident Forms from West Wolds u3a website. Just click on 'Info' then 'Information & Guidance for Group Leaders' to reveal the list below.
 - Risk Assessment Form: Home
 - Risk Assessment Form: Public venue

- Risk Assessment Form: Visit/event
- Incident Report Form

- b) For meetings held in a member's home please complete the Home Risk Assessment Form and submit to the GC before the activity takes place for the first time. After this, it will only be necessary to submit a further form if (i) the activity moves to another venue or (ii) some additional hazards or risks have been identified since completing the last assessment.
- c) Public Venues normally have completed Risk Assessments and Fire Safety Certificates. Ask them for copies before you book or use the venue, and also send a copy to the GC. If for any reason a copy of this is not provided, let the GC know, and carry out your own risk assessment, using the form above. Please bear in mind that, when using the venue, you will need to know where fire exits/assembly points are located. Also, you will need to advise group members of their location at the start of each meeting.
- d) if a GL would like to organise a visit or event associated with their group activity, please complete a Risk Assessment Form : Visit/Event, and submit to the GC.
- e) if anything seriously untoward happens during your group activity, e.g. suspected cardiac arrest broken bones, or concussion, then dial 999 and call for an ambulance. Please let the GC know the circumstances as soon as possible thereafter, submitting an Incident Report Form without delay.
- f) Public Venues normally have First Aid Boxes and Accident Report Books. Please enter the details of the incident in the Accident Book, letting the GC know the circumstances as soon as possible thereafter. Once again, complete and submit an incident Report form to the GC.
- g) In the case of minor accidents (e.g. small cuts or bruises) let the GC know the circumstances as soon as possible thereafter. Please complete and submit an Incident Report to the GC.
- h) GL's are advised to ensure that all group members make them aware of any medical conditions that could arise during any group activity/visit/event. GL's should also request members to carry a note detailing any medication they use.

8. Insurance

- a) The u3a insurance covers public liability but offers no insurance for personal accident or financial loss. Members participate in activities at their own risk.
- b) In order to be covered by u3a insurance, trips must be paid for through the West Wolds u3a bank account via the Treasurer and not by individual members. Full details are on the National u3a website and West Wolds u3a website 'Info – Information & Guidance for Group Leaders'
 - Insurance Details
 - Insurance Presentation Summary

9. National u3a (Third Age Trust) Website

The Third Age Trust's website (www.u3a.org.uk) is an excellent source for all kinds of information and material which you may find useful in your group activities e.g. online subject advisors. It publishes a newsletter (Third Age Matters- T.A.M.) five times a year and a Sources Magazine.

10. Policies and Reference Information

It is recommended as a GL that you familiarise yourself with the following West Wolds u3a policies available on the website. (Go to Info tab then Policies and Reference Information):

- Data Protection
- Safeguarding
- Equality, Diversity & Inclusion Policy
- Disability & Accessibility Policy
- Mentoring Policy
- Complaints Process

11. Welfare

GL's are asked to inform a committee member if a member of their group becomes ill or a close member of their family dies. This will enable a sympathetic card from West Wolds u3a as a whole to be sent.