



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).

Group Leaders should be utilising Beacon, the online membership management system, introduced nationally in 2015, and which Higham and Rushden u3a 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 next updated. Finally, thank you for volunteering and for your continuing support.

2. Group Leaders (GL)

GLs are vitally important to the success of our u3a. A u3a is a collection of Interest Groups and without GLs the u3a itself could not properly 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 carry on indefinitely, then that's fine, but running a Group for, say, three years is a splendid effort and well-deserving of a break. Once you cease receiving enjoyment from it, it is time to stop. 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 their own responsibility. 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 share the workload.

3, The Groups Coordinator (GC)

The role of the GC is to support GLs in the running of their Group(s) 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. 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 or will refer the GL to someone who can. GLs must keep the GC informed of any changes made in the running of a Group (changes of venue or meeting dates, or 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).

TAT is an excellent source of information and material which may prove useful to your Group activities. TAT publishes a newsletter (Third Age Matters) five times a year for a small fee and has a website www.u3a.org.uk which is well worth visiting.

5. Higham & Rushden u3a (H&Ru3a)

The H&Ru3a is affiliated to the TAT, but we are registered as a charity in our own right. Registered Charity No. 1164952. H&Ru3a 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 – Chair, Vice-Chair, Secretary and Treasurer. These are assisted by Elected Committee members including a Membership Secretary and a Groups Coordinator. The Committee (maximum 12 members under our present constitution) alone is responsible for the administration of our u3a and meets on a monthly basis. Beacon has been adopted to enable consistent handling of all administration matters.

6. Recruiting Members

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

- by promoting the idea in our monthly newsletter
- on our website
- at our monthly meetings.

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 paid-up member of Wellingborough u3a or any other u3a with which we have a ratified reciprocal agreement, with the GLs permission.
- 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 set out in the document “Group Etiquette” which is available to download from our 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 meetings in their homes. 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 advise 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 the scope of our constitution, but the following advice (distilled from years 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 and technology whilst in others the role is that of coordinating 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 any other housekeeping details should be discussed and agreed by the Group. GLs should not feel 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 the Group meetings in the event of the enforced absence of the GL. Through the GC, the Committee needs 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 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 or assisting with teas and coffees.

In some 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 members. 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 an established Group.

When a member joins a Group, they must provide a valid membership card as required for insurance purposes. GLs should also regularly check current membership on Beacon and take appropriate steps if an attendee has not renewed. 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 with them or recorded on their mobile phones. This information is generally known as ICE (In Case of Emergency information). Having easy access to this information enables urgent contact with a family member 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. Where the Group meets at a venue it is recommended that the form should include its postcode to aid location by emergency services.

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, against having too many attendees with the loss of quality or participation. Once a Group is declared full, the

GL must inform the GC. Together they should consider the possibility of establishing an additional 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 taken in the event of illness of one of its members, e.g. sending a card. In the case of terminal illness, the Chair and GC should be informed. In the event of the death of a Group member, our u3a will normally send a card. The GL should therefore send a notice to "Notifications" using the contact form on our H&R website. It is also very important that the Membership Secretary is informed in order to avoid any communication being sent that could cause 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 and if the meeting is late in the month, for example, then the December meeting could be skipped allowing members to concentrate on enjoying the Christmas festivities. Some Groups take time off during summer.

11. Equipment and Assets

A Group may need equipment to operate, for example, projectors or screens to enable images to be displayed by a Photographic Group or for visiting speakers. Any Group involved with music and dancing will need suitable sound equipment.

Capital Assets are those with a value in excess of £100. H&R u3a will purchase such assets from central funds where there is deemed to be a need with accompanying benefit for the membership. Any such assets are regarded as u3a property and are thus covered under insurance arranged by The Third Age Trust. Groups should not purchase Capital Assets without seeking permission of the Committee (see below).

Requests for the purchase of such equipment should be made to the Committee.

Once such equipment has been purchased the Group is responsible for its safe keeping. The Group must arrange for its safe storage when not in use and make it 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 whether to agree to the request. If the Committee refuses 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&Ru3a and be logged as a u3a asset. This must be done in order for the asset to receive the protection of insurance.

The GL is responsible for ensuring that 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 by J H May, Station Road, Rushden or another qualified electrical contractor. 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 PAT 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 Groups and is the only sensible way to do so, given that the costs involved can vary widely. It is not permitted (under Charity Commission guidance) for Groups to be subsidised or supported out of membership fees paid by the wider 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, or
- not 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 room hire,
- the provision of any refreshment, and
- the cost of any incidental expenses, such as postage

the GL may have incurred.

If the GL has to pay room fees in advance, then he/she may request Group members 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.

GLs should hold no more than £100 (or 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 any other 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 whoever is organising an event needs to get those who plan to attend to pay in advance with cash, by BACS (see below) 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.

(When paying for outings via BACS can you please use the following:

Sort Code: 54-41-05 & Account No: 32986742.)

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 overall responsibility for money in our u3a.

The reason for such controls is that the Committee members are also our u3a's Trustees and are, technically, ultimately responsible for such accounts. Therefore they need to be aware of their commitments. In the past we successfully bid for, and received funds from the National Lottery which were used to purchase equipment.

13. Resources for Group Leaders

The Third Age Trust seeks to provide support to u3as in all their activities, notably support for 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 which 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 3 weeks, to any GL or member who would like to use them.

The loans are free, as are the outward postage costs and the borrowers are only required to pay the return postage at the end of the loan. The library of items in the Resource Centre has been built up, mainly with the aid of lottery grant funds. A catalogue of these items is available from the Resource Centre.

- Open Learn. The Open University has put over 2500 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.
- Sources. This is an educational bulletin published by the Third Age Trust 3 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 at <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 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. Both tutored courses and downloadable self-teaching materials on a variety of subjects are included (www.u3aonline.org.au/courses)

14. Communication

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

Many GLs use email to communicate with Group members between meetings. Members who do not have email can be asked to supply some form of contact so they can be advised of relevant Group information.

GLs have several means of communicating with the overall u3a membership:

- Beacon
- Website
- Newsletter
- Monthly Meetings

The Newsletter is published each month and is accessible to all members via the Website and a few hard copies are available at a small charge at monthly meetings.

GLs are asked to provide their written content to the Newsletter Editor (news@h&ru3a.org) in good time to meet the deadline for publication. The News Editor's contact details can also be found on the website.

There is space on the website for a brief description of each Group's activities, display photographs and generally to promote the Group. Any material to be added to this space should be sent to the Webmaster. In addition, the Beacon Calendar should be kept up-to-date so that Group members are aware of forthcoming topics and any relevant changes.

GLs have an opportunity to promote or recruit membership at monthly meetings by manning one of the tables provided and/or have any Group information appear on the rolling screen. This is especially useful for events such as trips or outings,

The national u3a magazine (TAM) is always looking for stories. Contact the GC if you think your event or activity would be of wider interest.

15. Group Leaders' Meetings

Group Leader meetings will be organised when a need is perceived.

16. Health and Safety

A GL needs to be aware of the Health and Safety regulations of the venue in which Group meetings are held which is often only ensuring attendees know where the fire exits are and the sound of the alarm or signal.

17, In Case of Emergency (ICE)

It is good practice and custom for all u3a members to have with them details of who should be contacted in case of emergency or accidents.

18. Safeguarding Vulnerable People Policy

H&R u3a does not discriminate against vulnerable or disabled persons.

H&R u3a recognise its responsibility to safeguard the welfare of members involved in our activities. This policy provides advice to group leaders and specifies good practice guidelines to be followed by all members.

H&R u3a follows the Third Age Trust governing body policy of providing equality of opportunity to all members and potential members, regardless of social standing, language, ethnicity, gender orientation and educational background. All reasonable efforts will be made to facilitate membership for vulnerable people (as defined in the Home Office document “No Secrets” published March 2000) who wish to become members. If required, access will be extended to carers not meeting Third Age criteria.

The key principles of H&R u3a Safeguarding Vulnerable People policy are:

- The welfare of the vulnerable adult is paramount to any other considerations
- All participants, regardless of age, gender, disability, race, faith, culture, language or sexual identity have the right to protection from abuse or harm

Any allegations or suspicions of abuse or harm should be reported immediately in confidence to the group leader or any committee member for formal investigation under the Higham and Rushden disciplinary policy.

As a provider of activities for people no longer in full time employment, children are not normally involved in our activities. However, they may occasionally be present accompanying one of our members. In this case, the member must be with the child at all times and is responsible for the welfare of the child. In such circumstances this policy applies to the child as well as to any vulnerable adults.

Higham and Rushden u3a requires all its members to comply with the best practice guidance below. The following behaviours are not acceptable, will be treated seriously and may result in action being taken under the u3a disciplinary policy.

- Working alone with a child, children or vulnerable adult
- Consuming alcohol whilst responsible for children or vulnerable adults
- Bullying or humiliating children or vulnerable adults

- Inappropriate or unnecessary physical contact with a child or vulnerable adult
- Having an intimate relationship with any child or vulnerable adult developed as a result of being in a position of trust.
- Making sexually explicit comments or sharing sexually explicit material.

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 and can also 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. A set of Frequently Asked Questions (with answers) has been circulated to all u3as and a copy can be found on the National website.

All members who have paid their annual subscriptions (which includes the Capitation Fee) are covered by this insurance. Visitors to monthly meetings are also covered.

20. Accidents & Near Misses

In order to comply with the centrally-provided u3a insurance, if a member of your group suffers an accident you must complete an Accident Report Form, a copy of which can be found at

https://www.highamandrushdenu3a.org.uk/documents/Accident_Report_Form_new.pdf.

Completed forms must be submitted to the Secretary as soon as possible.

A near miss is a narrowly avoided accident and also needs to be reported so that our u3a as a whole can consider the circumstances, learn any lessons and if necessary, circulate guidance to all groups.

Completion of such forms will ensure that an accurate record is available 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

If your group wishes to copy any document or image for distribution to group members you are strongly advised to consult official Government copyright guidance at

<https://www.gov.uk/copyright>

and the u3a's own guidance at

<https://www.u3a.org.uk/all-documents/copyright-and-licences/download>

(you may need to create a login to the advice section of the central u3a website first).

Copyright is an area of the law which protects creativity. It confers rights on the owner of certain kinds of works including original literary, dramatic, musical & artistic works, as well as sound recordings and films, allowing them to control the way in which such works can be used and exploited. In the UK, copyright arises automatically when a work that qualifies for protection is created and committed to paper or another fixed form.

Copyright is a very complicated subject, and it is very easy to breach it inadvertently. In particular:

- ❖ Copyright does not need to be registered.
- ❖ The creator does not have to be a professional.
- ❖ A work does not have to have the copyright symbol or the word copyright on it for it to be subject to copyright.
- ❖ One piece of work can contain lots of different copyright elements. For example, in the case of a song, lyrics are protected as a literary work; the melody is protected as a musical work; and any recording of that song is protected as a sound recording.
- ❖ Singing groups can only copy sheet music for distribution to group members if all copyright in the relevant sheet music has expired (i.e. the copyright in not only the lyrics and music, but also the typographical arrangement). Otherwise, each member of the group will need to purchase the music individually. Alternatively, the group may want to purchase an Amateur Choir Licence which enables legal copying of certain materials.

Our affiliation to the Third Age Trust entitles us to take advantage of 2 centrally obtained licences for using (but not copying) audio-visual material:

- The MPLC Umbrella Licence allows audio-visual content (including DVDs, downloads and streamed materials) to be screened in a public location, for example a community hall or in a member's home as part of an interest group, provided admission is not charged.
- The PPL PRS Licence (also called 'The Music Licence') allows a venue to legally play music through the radio, TV, other digital devices and during live performances. The Third Age Trust has a PPL licence for music use for u3as across all venues. This ensures that all recorded music used by u3as is licensed by PPL and eliminates the need to investigate whether the licences held by the venues (if any) are suitable to cover music used by u3as.

22. Administration

Officers and Committee Members are listed under "Our Committee" tab on our website. There is also an annual planner with useful dates, including when committee meetings are held.

The following documents can also be downloaded from our website:

- Accident Report Form
- Group Meeting Register
- Group Etiquette
- Group Leaders' Financial Report
- Potential Meeting Rooms



Higham & Rushden u3a