

U3A Group Leaders' Handbook

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1. Introduction

This is a General guide and is offered to the leaders of Aughton and Ormskirk U3A groups. These groups are our lifeblood, and the strength of Aughton and Ormskirk U3A is in their success.

The running of a group and its administration will vary greatly, depending on the type of group and its needs. If there are any errors or omissions that effect your group, please advise the Group Support Committee (GSC).

Group leaders are vitally important and play a key role in the successful operation of our U3A. The U3A consists of a collection of interest groups, and without group leaders it couldn't really exist. Being a leader always involves a certain, usually modest amount of organisational and administrative work, we would encourage you to involve your group members in choosing the programme or topics, in taking part in discussions or asking questions, help to set out the room, and serving of refreshments. Last but by no means least try to establish at an early stage a succession plan, someone who is willing to take over the group, should you need to relinquish that role. You give your time and knowledge freely; don't tire yourself out by doing everything for your group.

The guidelines below are intended to help you run an existing group or indeed start a new one. If you find they are not sufficient for your needs, then do not hesitate to speak to the GSC or an officer from the Management committee.

2. The Group Support Committee

The chairman of the GSC is the first person a group leader should consult if he or she has any questions about group matters. The Chairman of GSC is the person who helps new groups get started and provides support for established groups.

The GSC will provide advice and help on group matters or will refer the leader to someone who can assist. In turn, the leader must keep the GSC informed of any changes made in the running of the group – changes of venue or meeting dates etc. It is particularly important to let the GSC know if the group leader plans to step down, or if the group is being wound up.

3. Structure of the U3A

The Aughton and Ormskirk U3A was first established in 2003 and from small beginnings has grown into an organisation numbering about 2000 members. We have a board of trustees who are legally responsible for the activities of the U3A, the Trustees delegate the day to day running of the U3A to a Management Committee, and the management committee are assisted by 4 sub-committees. The elected trustees are normally in office for 4 years, Members of the Management committee are elected at the AGM, and serve for a period of 3 Years. The management committee meet on a regular basis and the minutes from those meetings are published on the U3A website.

The Aughton and Ormskirk U3A is a registered charity (No 1052005) but is affiliated to the Third Age Trust, which is the national organisation for the approx. 1000 U3A's in Britain.

4. The Third Age Trust

Our parent organisation The Third Age Trust is an excellent source of all kinds of information and material which you may find useful in your group activities. It publishes a newsletter, Third Age Matters, four times a year, sources magazine and a website www.u3a.org.uk which is well worth visiting.

5. How to start a New Group

The Aughton and Ormskirk U3A has about 100 groups where members meet on a regular basis, to take part in and contribute to a shared interest in a friendly and sociable environment. Any member can put forward suggestions for a new group they themselves would like to establish and run, or suggest a group they would like to see established. Ideas for new groups are always welcome and support will be given by the learning and group support sub-committee in order to ensure the new group becomes established and has an active membership. The learning and group support sub-committee will assist in finding a venue for the new group to meet. At present we use 4 main venues, Scout and Guide HQ, Aughton village hall, Scarisbrick village hall, and Christ Church ministry centre.

6. Publicity for your group

Publicity for your group or (Short Course) can be achieved via a variety of methods, please contact the communications sub-committee for help and advice on these methods.

Website

Leaders should ensure that their group page on the U3A website is kept up to date and contains appropriate photographs. There is no limit to the information that can be added. A contact name and telephone number should be included. The information should be updated at regular intervals to keep the page fresh and attractive.

Magazine

Groups should also insert details of group activities in the quarterly magazine. You will normally be asked for these 4 times a year in time for the next magazine. A contact name and telephone number should be included.

Enewsletter

Information for new groups, events, alterations in meetings, or anything else can be put into the e-newsletter each month.

Horizons

Announcements can be made at Horizons and relevant fliers put out on the tables.

Facebook

Our U3A has a Facebook page – useful for dissemination of relevant group and short course details.

Publicity contact details

Send info for the magazine to magazine@aughton-ormskirk-u3a.co.uk

Send info for the website to webteam@aughton-ormskirk-u3a.co.uk

Send info for the enewsletter to enews@aughton-ormskirk-u3a.co.uk

See the Communications page within our U3A website for further information.

7. Running the Group

A group may be run as the leader and its members wish, but the following guidance may be useful. The role of the Group leader will vary according to the type of group being run. In some groups the leaders follow a structured plan that might involve some degree of guidance and tuition, e.g. languages, aerobics, whilst in others the role is that of coordinating events and people, e.g. Art appreciation, theatre visits.

The group leader 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. This should include the use of the microphone.

A register of attendance at all meetings should be kept, which should include membership numbers, as shown on membership cards. The group leader should ensure that all members of the group are members of our U3A, as this is required by the insurance. A sample of the attendance register is shown at appendix A. If during a group meeting an incident occurs which results in an injury to a member or to any property an accident report form must be completed. See section on accidents below.

Aughton and Ormskirk U3A's Health and Safety Policy (see website) acknowledges that Group Leaders have a key role to play in ensuring the health and safety of members when planning and running the activities they lead - see below in Section 12.

8. Financial matters

1. At each group meeting held at premises for which U3A incurs a rental charge, attendees must pay an “attendance fee” of a minimum of 50p, as a contribution towards that rental charge, which is paid directly by U3A.
2. As a general rule group leaders should hold no funds. However, with members’ consent, they may collect an amount modestly in excess of this (50p) minimum, to be used (for example) to offer members “free” attendances in future weeks or for group social occasions, and to pay for refreshments.
3. The group leader may deduct up to £10 at any one time from the attendance fees collected, to reimburse themselves or a group member for postage, stationary, materials or equipment necessary for group activities. Receipts must be submitted at the time of paying over the monies to the Treasurer, and the deduction shown on the paying in slip.
4. Where any “excess” funds are intended to cover the future cost of a purchase of equipment or materials, the group leader may elect to deposit the funds with the U3A Treasurer, who will pay the (eventual) cost directly to the supplier.
5. Alternatively, the group leader may apply for purchase of equipment to the Chairman of the Finance and Resources committee. If approved, the cost of the purchase will be met by U3A. The equipment or resource will become the property of U3A, and may be made available to other groups. See the “group equipment request form” in the appendices to these guidelines.
6. The arrangements described in (2) and (3) do not apply in the case of holidays, day trips and other organised events, the costs of which should be paid by group members, preferably by cheque payable to “Aughton & Ormskirk U3A”. The cheques should be lodged with the Treasurer, who will pay the costs (Venue, Catering, travel, admission etc.) directly to the supplier.
7. When depositing cheques or cash with the Treasurer, group leaders should note on the paying in slip how much relates to members ‘attendance fees (see 1 above), and how much relates to “contributions & deposits”, as described under (3) and (4) above.
8. Group leaders should not handle transactions for group activities through any other bank account.
9. Group leaders should use the forms included in the appendices to this handbook to apply for approval of funding for an event, to purchase equipment or reclaim expenses.
10. Group leaders should maintain a record of receipts and payments, including monies paid to the treasurer, throughout the year. This is especially important where contributions and deposits are collected, as well as attendance fees.

9. Resources for Group Leaders

The Third Age Trust seeks to provide support to the U3As in all their activities. This learning support is co-ordinated 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. There is advice on starting and running a group on almost any subject. You will need to create an account on the Third Age Trust website before you can access the resource page.

Additional study materials and resources can be found on the following;

- Future Learn gives free access to course materials from a host of top class universities from around the world, details of the range of subjects available at Future Learn are available at www.futurelearn.com
- Learn with the BBC: Links to a wide range of courses ranging from Art and Design to Sports and Fitness, to a range of languages can be found at www.bbc.co.uk/learning
- The North West region organises study days on particular themes, which enable participants from U3Asto study aspects of a subject in depth
- Each year the Third Age Trust organises one or more summer schools, which again give U3A participants the opportunity to explore a chosen subject in some depth while enjoying a residential experience

10. Communicating with your group members.

Group Leaders have three means of communicating with the overall U3A membership; The e-newsletter, the website and the magazine, (See above)

Group Leaders use a variety of ways to communicate with their group members in between editions of the magazine. The email newsletter is sent out every month and can be used to let group members of any changes, cancellations, etc. of the published programme. Some groups ask for emails from group members and create a “group list” so that they can send out one email which reaches all group members. (Consult the Computer advice on a Monday or Tuesday morning if you need help with this).

It is also a good idea if Leaders inform group members of any general U3A matters at the groups regular meetings.

11. Meetings for Group Leaders

Every year there is a group leaders meeting. This event gives Group Leaders an opportunity to raise issues for discussion with committee members and can also be a way of thanking the group leaders for their efforts during the year. This event enables leaders to mingle with fellow leaders, discuss best practices and share experiences.

12. Health and safety

A group leader needs to be aware of the Health and Safety regulations of the venue in which the group meetings are held, in practice this is usually making sure that all the group know where the fire escapes are and where they should assemble in the event of an evacuation of the building.

In the case of the Scout and Guide HQ, any extra security bars/bolts on fire doors should be removed/unbolted at the start of each group meeting, and replaced/bolted at the end of the meeting.

Leaders should be aware of the fire assembly point for the premises they are using. In the case of the Scout & Guide HQ it is the car park of Christ Church Ministry Centre near the Vista Café.

You should have the postcode of the premises you are using on your attendance register as this will be needed if you have to call an ambulance or the Fire Service. The Postcodes are as follows.

- Scout and Guide HQ, L39 5AS
- Christ Church Ministry Centre, L39 5AS
- Aughton Village Hall, L39 5DH
- Scarisbrick Village Hall, L40 8HH
- Lydiate Village Centre, L31 2LA
- Ormskirk Civic Hall, L39 1LN
- Green Lane Guide HQ, L39 1NF
- Town Green WI Hut, L39 6SF
- Haskayne Village Hall, L39 7JE
- Burscough Sports Centre L40 0SD
- Hurlston Hall L40 8HB
- St Michaels Church Hall L39 6SB

Most of our groups meet at the Scout & Guide HQ. A condition of our use of the building is that our meetings will not finish between 3.15 and 3.45 to avoid exacerbating traffic congestion at the end of the school day.

It is the responsibility of all group leaders to make themselves aware of location and operation of the defibrillator which is outside the Scout & Guide HQ.

The Aughton and Ormskirk Health & Safety statement can be found and downloaded if necessary, from the A&O U3A website.

12 (1) First use of premises

Before initial use of any premises, and at regular set intervals (annually may be appropriate), the basic arrangements as set out in the checklist “PREMISES SAFETY CHECKLIST” (Website) should be checked and recorded on the form.

The completed forms, paper or electronic, should be retained for four years.

The U3A management should arrange for the completion of Part 1 of the checklist and seek advice or assistance from the person who controls the premises if the arrangements appear to be below a reasonable standard. Minor shortcomings should be notified to the person in control of the premises. The checklist should be available on the U3A website.

12 (2) Regular use of premises

The health, safety and welfare of our members while using other's premises should be checked before activities take place, (this does not include private houses used by members at the invitation of the householder).

The arrangements set out in part 2 (Website) of the checklist should be checked at each use, no record is required as these are routine and basic precautions.

Any member who believes that the conditions at a venue constitute an immediate and substantial risk to the safety or health of attendees should vacate the premises or inform the person who controls the premises if possible and contact a Management Committee member. Non-urgent matters should be notified to the person in control of the premises.

12 (3) Group Activities

The arrangements for doing group activities must, so as far as is reasonably practicable, keep members safe. With many groups (e.g. learning foreign languages) the risks involved are no different to those of everyday life, and no extra precautions should be necessary. But with other groups (e.g. walking, cycling, horse riding etc.) there are likely to be additional risks involved, especially for older people. With these types of activity, the Group Leader should ensure that suitable arrangements are in place to manage these additional risks.

One way of doing this would be to adopt the arrangements recommended or advised by a National Organisation which oversees the particular activity. For example, the Ramblers Association for the Walking Groups, British Cycling or Cycling UK for the Cycling Group

12 (4) External Tutors

Where an external tutor is contracted to lead a group activity, he or she is responsible for ensuring the health and safety of group members.

13. Insurance

- Every member of every U3A in the country is covered by an insurance policy taken out by the Third Age Trust. The insurance we hold is known as Public and products Liability Insurance. It insures a U3A member against compensation claims arising from injury or damage to property suffered by a third party. The following points will help keep risks to a minimum.
- It is vital that all activities are conducted to minimise risk. Ideally and legally we should always act prudently as if uninsured.
- Participants in any activity should be paid up members of Aughton & Ormskirk U3A or bona fide visitors.
- Health & Safety Regulations require groups to be able to identify all present at any meeting.
- U3A require all groups to use a standard attendance sheet, which is kept by each Group Leader.
- An Accident/Serious Incident Report Form (Website) should be completed and a copy given to the Secretary. (see also next paragraph).
- The group must adhere to any additional conditions required by the premises licence with particular reference to fire regulations. (This also applies to outside premises.)
- Non-member tutors being used by a group should have their own liability insurance

and lodge evidence of such with the Secretary.

- Walks – a special disclaimer form **MUST** be completed by anyone taking part in an organised walk (available from Leaders).
- Full details of all U3A insurance cover can be found on the national U3A website

14. Accidents

A requirement of the insurance as set out above is that in the event of a member of your group suffering an accident, you must complete an accident/Serious Incident report form, as soon as is reasonably practicable following the event, the completed form must be returned to the U3A Secretary not later than 24hrs after an incident. The Secretary should monitor trends and advise the Management Committee. Records should be kept for 4 years.

15. Copying/Photocopying

A photocopier is available in the computer room for group leaders if they need it, the photocopier should be used for small numbers of copies. (20 or fewer)

There is a Risograph machine situated in the smaller room in the Scout & Guide HQ this should be used for larger copy runs (20 or more), notice should be given to Bill Watkinson who can instruct group leaders on the use of the Risograph.

All group leaders should ensure they have received a code enabling them to use the photocopying machines this code **should not be given** to anyone else.

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A copy of the U3A's Licences in relation to Photocopying, Digital Images, Recorded Music, playing of DVD's/Videos, Performance – PRS Licence is shown in the appendices.