

u3a

Southport

Charity No. 1164448

GROUP LEADERS HANDBOOK



learn,
laugh,
live



THE UKE-A-TEERS

FOR ONE
D
ALL

GROUP LEADERS HANDBOOK

CONTENTS

WELCOME	PAGE 3
FORMING A NEW GROUP	PAGE 3
BEING A GROUP LEADER	PAGE 3
ADVERTISING YOUR GROUP	PAGE 4
GROUP LEADERS RESPONSIBILITIES	PAGE 4
MEETINGS	PAGE 5
THE FIRST MEETING	PAGE 5
FINANCE	PAGE 6
COPYRIGHT	PAGE 6
CONFLICT WITHIN THE GROUP	PAGE 6
HEALTH & SAFETY	PAGE 7
MEMBERSHIP	PAGE 7
DATA PROTECTION	PAGE 8
FINALLY	PAGE 8
ADDENDUMS:	
PARTICIPATIVE LEARNING	PAGE 9
SOURCES OF HELP AND SUPPORT	PAGE 10
GROUP LEADERS FINANCIAL REPORT FORMS	PAGE 11 & 12



WELCOME

Thank you for volunteering to act as a group leader. The success of our organisation is measured by the number and variety of our groups and maintaining the balance between social and learning groups. Southport U3A's continuing growth fuels a comparable growing demand for new and varied activities creating a supportive and friendly community which enables everyone to participate. As a group leader you are an essential part of this community and, as with any community we are all here to encourage and support each other within the context of the U3A ethos of shared participative and self-help learning.

This leaflet is not designed to be a comprehensive or definitive guide to your role. As a developing organisation under the auspices of the National U3A committee and the Charity Commission we are subject to ongoing legislative changes and updates to our operational practices. It is intended that this leaflet will be updated accordingly. If you have any queries or require further explanation, please do not hesitate to contact the Group Activity Co-ordinator or any member of our committee. Your committee is there to support you.



FORMING A NEW GROUP

If you have a particular interest or wish to expand on an existing group the initial contact is the New Groups co-ordinator (contact through the website or at the monthly meeting) who will discuss your requirements i.e. aims, objectives, premises, equipment etc.



BEING A GROUP LEADER

The first thing to understand is that the Group Leader need not be an expert in the subject. U3A groups are about learning together. We would recommend you have either co-leaders or assistant leaders for a group to cover sickness and holidays. Please acquaint yourself and the Co-leaders/Assistants with Southport U3A constitution and policies which can be found on our website.

To form a new group, contact the New Groups Coordinator (contact through the website or at the monthly meeting). After a discussion the format of the group and possible dates and venues can be provisionally decided.

Setting up a Beacon Account for your Group.

1. Request the Group Activities Coordinator to add your group to the Beacon and U3A websites and our Information Leaflet. These will show your contact details.
2. You will be given a login and password to access your group on the Beacon site.
3. Members have 2 ways to join your group, you can ask them to contact you by the most convenient way for yourself, perhaps email or phone, or, you can allow them to join your group 'online' via the Beacon site. If you chose this method you will still receive an email notification of any new addition.
4. Whichever way you chose to attract members they must all be recorded on the Beacon site

ADVERTISE YOUR GROUP



Advertise your group activities, events, outings, times, dates, recruitment of members etc. by contacting the webmaster (via the website) to post your details on our website

Arrange to have a table at our Christchurch meeting to give out leaflets or information

Have the group announced on the stage, either by Group Activities Coordinator or yourself, explaining what the group is about.

Ask for an OHP to be shown at Christchurch advertising your group.

Publish an article in our newsletter, advertising your group and giving your contact details.

When the group is about to start, there would normally be an initial meeting with the members. (see 'First Meeting' paragraph below)

GROUP LEADERS' RESPONSIBILITIES

At each meeting of the group, an attendance register must be updated.

If the group collects fees for travel, meals, room hire, tutor fees etc, the takings must be banked. To enable this, the Treasurer will provide a Paying In book which can be used at any NatWest bank or the Post Office. More explanations of the financial requirements appear later in this document.

A regular report (see addendum) is to be sent to the Treasurer to report the money banked, and to confirm the dates of use of a hall or a tutor.

There are several ways to do this which is explained below (see Finance)

A list of members should be maintained including membership number, contact details (email and phone) and emergency contact details. This can mostly be managed through the 'Beacon' system.

(See Data Protection paragraph below)

Each year, in February, the U3A Membership Card must be checked, as must the cards for new joiners to the group. A non member may attend up to two 'taster' sessions with the group but must then join the U3A.



MEETINGS

Group meetings are usually defined by the nature of the activity. Some groups meet weekly, monthly or annually and meet in members' homes, rented premises or on trips/outings.

Members' Homes

Most groups meet in members' homes, sometimes in the group leader's home or in rotation around the homes of individual group members, dependant on access and capacity.

Rented Premises

If your group requires rented premises, please contact the Activities Co-ordinator or the New Groups Co-ordinator who will support you in sourcing suitable premises. Any booking of premises and signing of any agreement/lease must be approved and completed by our committee. The Activity Co-ordinator will advise.

Outings, Events

Outings and events are advertised as above and fees are usually collected in advance. As all groups are self financing, all outings should be costed to include all charges e.g. venue, tips, transport etc. If possible, groups should use public transport to reduce costs to members.



THE FIRST MEETING

- Introduce yourself and the purpose of the group as you see it
- Ask to see U3A membership cards
- Ask about the skills within the group
- Appoint a deputy/co-leader to lead the group in your absence
- Agree the tasks that need doing to run the group and who is willing to support these e.g. who is willing to help with the programme, keep the register etc.
- 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
- Agree when and where the group will meet.
- Identify any accessibility needs that group members may have
- Agree the costs for running the group and what members will pay?
- Confirm with your U3A Treasurer (contact through the website or at the monthly meeting) how monies will be handled and reported.
- Discuss how group members will communicate with each other bearing in mind data protection concerns. Group Leaders and members usually communicate online through the 'Beacon' system. Advice and training is available (contact Groups Co-ordinator)

Feed back what was agreed at the first meeting to New Groups Coordinator to finalise arrangements and update your group activities on the website by providing regular information to the Webmaster.

FINANCE



The treasurer is responsible, with the committee, for all income and expenditure on behalf of Southport U3A and ensures probity and compliance with legislative requirements and good practice.

If your group meets in homes and makes only a nominal contribution towards refreshments, there is no need to bank any money.

Groups which rent premises, pay speakers and/or tutors must bank all income (session fees, collections etc.) through the Southport U3A bank account.

As indicated above, all groups are self financing and all costs are recouped from group members. You will be required to submit a list of attendees (including current membership number) to the treasurer (see addendum) along with proof of purchase/receipt/invoice or proforma. Group Leaders cannot pay for rent, speakers, travel, equipment etc. from fees collected. Upon request to the treasurer, these costs will be paid from the group Leader's account.

Some groups may build up monies in their group account but should provide a statement of intent e.g. Christmas meal, special event etc. for disposal of these monies.

If you collect fees, the treasurer will advise on procedure and provide paying-in books.

It is recommended leaders create a petty cash fund, by levying a nominal fee on group members to cover ongoing operational costs e.g. stationery, printing etc. Petty cash limit is currently £20.

Group balances are issued regularly by the treasurer. Any queries regarding group balances should be addressed to the Assistant Treasurer



COPYRIGHT

The Trust holds a licence to copy some materials for educational use within groups. If you are going to be using copyright material in any form, for example, printed, audio or pictures, please check with the advice section of the national website for further details on copyright.



CONFLICT WITHIN THE GROUP

All members agree, upon application, to treat fellow members with respect and courtesy at all times and to comply with and support the decisions of the elected committee. Sometimes divisive issues can arise within a group threatening the running of the group as a whole. Do not ignore a problem. Where there is potential for friction it is advisable to bring it into the open and resolve the issue. If you cannot reach a resolution informally, speak to your Groups Coordinator or another committee member. If a situation is not resolved informally and becomes acrimonious, your committee may

initiate formal procedures. A Group Leader may seek to exclude a member or members from the group. A formal request must be forwarded to Southport U3A committee for consideration. A group leader cannot exclude a member from a group. This decision lies solely within the remit of the committee.



HEALTH & SAFETY

Southport U3A carries public liability insurance to cover members when engaged in U3A activities. If your group operates from private accommodation, it will be covered and members protected under the terms of the insurance policy. This assumes the property is reasonably safe and free of obvious hazards.

Where activities are supervised by a paid tutor/coach he/she should provide their own public liability insurance to cover members. Rented premises are similarly covered and premises should provide insurance including completed risk assessments available upon request. All accidents should be reported via the accident form on Southport U3A website to the Activities Co-ordinator. Group leaders, particularly leading activities outdoors may wish to carry out their own risk assessment. Please contact the Group activities co-ordinator who can offer help and support.

Trips abroad are not covered by U3A insurance. Leaders should ensure flights are ATOL protected and individual members have personal insurance.

It is advisable that, especially for physical activities, some members should have basic first aid training which can be accessed through the U3A. All members should provide details of emergency contacts and pertinent medical conditions. Group leaders may request this information which must be confidentially and securely stored. Members who decline to divulge this information may be excluded from the group activities.

Although we encourage all members to join groups, where there is a physical requirement for the activity, the group leader may limit access on fitness grounds. Likewise leaders may stipulate a certain level of knowledge and/or expertise e.g. beginners/intermediate/advanced/mixed to ensure the standard of the activity is suitable for the whole group.



MEMBERSHIP

Learning is by members for members and no payment can be made to members for services to any U3A. All group leaders must pay the same fee as other members of their group.

All participants in U3A group activities must be fully paid members of Southport U3A and should endeavour to ensure that people wishing to join a U3A are actively encouraged and supported.

Prospective members may attend two sessions prior to joining. Members of other U3As are not entitled to attend unless they also join Southport U3A.

Membership is renewable annually in February and all members have until 30th April to renew.

Any member who has not renewed their membership by 30th April, or is officially excluded, is not permitted to attend any U3A activities.

Please visit the website where you will find details of other groups, names of committee members and policies/documents pertinent to Southport U3A.



DATA PROTECTION

It is important to bear in mind that all members' details are confidential and should be stored securely. This information may only be shared with the relevant member's consent. You may take photographs of the group's activities with members' consent. If you wish to include these photographs in any publication, including sharing online, you must gain the members' permission. If a member leaves the group or withdraws their consent their details should be deleted. If the group folds for any reason, all details of that group should be deleted. You will find further details of our Data Protection policy on the website. If you have any queries regarding Data Protection please do not hesitate to contact a member of the committee.

FINALLY

Please enjoy the rewarding role of group leader. You will find new friends with mutual interests. If you have any concerns or anything of interest you would like to share with other group leaders, please do not hesitate to contact the Chair or any other committee member.

The U3A is constantly seeking new and fresh ideas to maintain this vital, active and progressive organisation and to this end the Chair and committee are open to re-election annually with a maximum tenure of 3 years for named officers, including Chair.

If you wish a greater say in how your U3A is managed, consider putting yourself forward. You will have the opportunity of participating and shaping an active and flourishing organisation.

Please see website for details of our policies.



PARTICIPATIVE LEARNING

Possible Options are:-

A visiting speaker: A one-off visiting paid speaker, non-paid tutor or someone from another interest group or U3A.

Group member presentations: A short presentation by a member of the group or a member leading the meeting on a specific topic.

Discussion groups: Some activities will lead to discussion e.g. 'What the papers say', 'Which way does water go down the plug hole – and why?'

Project based: A project chosen by the members. Each person (or pair) allocated an area of research which they bring to the group. This can be a good way to learn new technology.

Practical work: This might lean towards specific subjects such as science, craft, photography, creative writing, storytelling etc.

Drama: Create a short sketch. Provide some entertainment for your monthly meeting.

Themes: Have an event or presentation linked to a specific topic.

Liase with a school or community group: e.g. local history presentation, art exhibition, debate.

Liase with other organisations: Museums, Universities, Libraries. Very useful for Shared Learning Projects.

Shared Learning Projects: These are opportunities to work on short term projects with other U3As or outside organisations. They usually involve research and have a definite outcome.

Study days and workshops: Plan one for your own members or as part of a local network. e.g. Family History Day, Language day, Storytelling workshop, debate, quiz, music.

Online learning: MOOCS (Massive Open Online Courses), YouTube 'How to' videos, Future Learn.



SOURCES OF HELP & SUPPORT

Educational resources: National Office offers access to a range of educational resources. These can be booked via the national website if you create an account. For DVD loans, the only cost is return postage.

Sources and Sources Online: Sources is the educational publication and online platform where the work of interest groups is showcased. Sources online can be accessed via the national website or via www.sources.u3a.org.uk

Subject Advisers: Trust volunteers with specialist knowledge in a wide range of topics. Contact details are available on the national website and in Third Age Matters.

External organisations: Museums, libraries, schools, universities.

U3A publications: Check the national website for the latest publications.

Networks, regions, neighbouring U3As: Allow you to draw on experience from within the movement

Regional Trustee: will provide an overview of the region and a link to National Office

National Office: The staff team are available Monday to Friday to offer support

Research Database: Contains up to date information regarding research projects. The database is available under the resources tab of the website.

Other learning opportunities

Enquiry-led Learning/ the Research Network : Shared Learning Projects and Research links with universities and within U3As; contacts available from the national website.

National and Regional Summer Schools

Events facilitated by National Office

National, Regional and Network Workshops and study days.

1. Group Leaders financial cash receipts monthly report form

SOUTHPORT U3A Horizontal Walking Group (Month)

Leader

	NAME	Mem. No.	Week 1	Week 2	Week 3	Week 4		
1	Member 1	111#	£3.00	£2.00	£2.00	£2.00		
2	Member 2	112#	£3.00	£2.00	£2.00	£2.00		
3	Member 3	111#	£3.00	£2.00	£2.00	£2.00		
	Member 4	112#	£3.00	£2.00		£2.00		
4	Member 5	111#		£2.00	£2.00	£2.00		
5	Member 6	112#	£3.00	£2.00	£2.00	£2.00		
6	Member 7	111#	£3.00	£2.00	£2.00	£2.00		
7	Member 8	112#	£3.00		£2.00	£2.00		
8	Member 9	111#	£3.00	£2.00	£2.00			
9	Member 10	112#	£3.00	£2.00	£2.00	£2.00		
10	Member 11	111#	£3.00	£2.00	£2.00	£2.00		
11	Member 12	112#	£3.00	£2.00	£2.00	£2.00		
12	Member 13	111#	£3.00	£2.00	£2.00	£2.00		
13	Member 14	112#	£3.00	£2.00	£2.00	£2.00		
14	Member 15	111#	£3.00	£2.00	£2.00	£2.00		
TOTAL INCOME			£42.00	£28.00	£28.00	£28.00	£0.00	
Rental			£30.00	£30.00	£30.00	£30.00		
Variance			£12.00	-£2.00	-£2.00	-£2.00	£0.00	
Expenditure (Tutor, Equipment etc.)					DATE	Paying in slip No.		
Total Monthly Inc.			£126.00				Total Banked	£135.00
Total Monthly Rental			£120.00				Total Bal C/F	
Total Variance			£6.00				Total Bal Month End	£6.00