



Learn, Laugh, Live

Group Leaders' Handbook

July 2024

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1. Introduction

This handbook provides a source of information for new and established Group Leaders.

Stockton u3a is one of the earliest established (1986) in the country. Its continuing growth and success are due to the dedication and thoughtfulness of our Group Leaders. By maintaining the u3a ethos of continuous learning, developing interests and making new friends they have increased the subject range and the membership. Membership is open to all no longer in full-time employment, and we encourage all who wish to join to do so.

0. Group Leaders

The leader of a group may be the person who suggested it, or someone who volunteers to lead. The leader's role is that of "facilitator", encouraging all to participate, without being intrusive. They do not have to lead each session: indeed, our ethos is that all members should contribute to the work. The leader should take steps to ensure the safety and well-being of the group (see Section 5). Advice can be given by the Groups' Co-ordinator or other members of the committee if required. It is good practice to ensure that there is a deputy leader to stand in during the GL's absence, and where necessary a successor if they stand down.

Group Leaders meetings will be held three times a year, and Group leaders will be notified by email. At these meetings they discuss matters of common interest or concern. Group Leaders are welcome to publicise their group's activities at the Monthly Meeting, or in the Bulletin. The committee is also happy to publicise groups and their activities.

GL Meetings will be held termly in

September

January

April/May

There are a number of subject networks in the region which Group Leaders may like to join. Advice is also available from the subject advisers listed in the TAMs magazine and on the national website.

3 Setting up a Group

When a number of people with a shared interest wish to form a group, they must seek approval from the committee. The group must follow the objectives in our constitution. (See section 8) The Accommodation Secretary should be informed, will advise on suitable venues and make the booking for you.

The formation of a new group will be announced at the Monthly Meeting, in the Bulletin and by email to all members.

4 Funding for groups

In order to receive funding for accommodation, the group must have a minimum of 10 members on the register, (in order to ensure an average attendance of at least 8).

Funding is not available for groups where there are on average fewer than 8 members attending. However, members are welcome to form smaller groups, which would meet in their own homes. They would still benefit from the support of the committee, Group Leaders' meetings and Subject Support, as well as u3a public liability insurance.

If and when such a group increases in size, (which should be the objective), funding can be provided.

Short Courses

These can be set up to address a particular subject for a short time, from half a day to around twelve weeks. They operate in the same way as other groups.

5 Running a Group

. General requirements

The following list sets out practical requirements to be considered when setting up a meeting, but it is not exhaustive, as all groups are different:

i Venue

Is it suitable for subject and group size?

ii Access

Is the venue on a bus route?

Is there adequate parking?

Is there access for members with mobility restrictions?

iii Facilities

What are the toilet and refreshment facilities, including disabled toilet?

Where is equipment stored?

Are there adequate power points?

Is technical help available?

Is Wi-Fi available?

Group Leaders new to a venue should familiarise themselves with the emergency procedures and risk assessments of the venue. Emergency procedures and Risk Assessments for each venue are included in the Appendices. The Accommodation Secretary also has a copy.

A venue risk assessment checklist can be downloaded from the advice section of the National Website (member sign in required), or use the link below

<https://www.u3a.org.uk/component/edocman/online-based-risk-assessment-checklist-2/download?Itemid=0>

b. The first Meeting

Before starting a group, the Group Leader should set out their aims and how the group will run in emails, and/or in the Bulletin and/or at the Monthly Meeting.

At the first meeting introductions should be made, the above points should be discussed and the group should discuss arrangements for refreshments, (if any), and toilets and for emergency evacuation. These points should be repeated for members who join later.

Refreshments may be provided if the group agrees, and a small charge levied to cover costs. The member(s) providing the refreshments should be reimbursed. If, over time, a profit is made, this may be used to

provide resources for the group. If not, it should be handed to the Treasurer.

At the first meeting a register should be started. Blank registers can be downloaded from the Stockton u3a website, or follow the link below.

<https://u3asites.org.uk/files/s/stockton/docs/classregister2021-22.pdf>

See paragraph c below for more information on registers.

c. Attendance and Funding

Room hire, if required, will be funded for a group with an average attendance of no fewer than 8 members, (at least 10 on register). Group Leaders must keep registers of attendance and return them to the committee at the end of each term, prior to the next term's Group Leaders' Meetings

Spring term (January to Easter)	-	April/ May meeting
Summer term (Easter to July)	-	September meeting
Autumn term (September to December)	-	January meeting

Before each GL meeting, registers will be reviewed, and if any funded group has an average of fewer than 8, they will be given one term to improve numbers, and if unsuccessful, funding will be withdrawn. The committee will offer support to increase membership during this time.

Each group requiring room hire is funded by Stockton u3a for up to 44 hours a year. Where groups meet more than this, they must be self-funding for the rest. The Treasurer is responsible for paying all approved accommodation charges. Each January, the Treasurer will give these Group Leaders an estimate of the likely amount needed (based on average costs over the year) and will update GLs if room hire costs change.

- For GLs who prefer to collect monies weekly, these should be banked roughly once a month and be completed by October.
- For GLS who prefer a lump sum approach, the whole amount should be paid in September.

- The preferred method of payment is for the GL to collect cash and then transfer the equivalent amount to the u3a account by online banking, with the group's name as reference.

If a class needs to be cancelled, the Group Leader may do this and then contact both the Accommodation Secretary and the Treasurer to say that it has been done or the Group Leader may contact the Accommodation Secretary to request the cancellation. Note: this should be done in good time, wherever possible, as venues may still charge us if short notice is given.

If an extra class needs to be arranged, the Group Leader should request this via the Accommodation Secretary. This is for contractual reasons.

Group Leaders should check Beacon at the start of the year to make sure group members have renewed their u3a membership. (Any that have not done so will be highlighted in red). The Beacon list can be used to start the register. GLs will be able to add new members who have registered, when they join the group. Attendance must be recorded for group size (see Section 4), and completed registers handed to the Chair at the end of each term. Members who are unable to attend should be asked to give notice in advance when possible. The completed registers enable the u3a to determine if funding should continue, or if a change of venue is needed.

Prospective members may be allowed to attend one class as a trial before joining the u3a, and should not go on the register before they join.

The Beacon Management System (see Section 8) is used for recording membership. One of the Beacon Administrators will teach new Group Leaders how to use it and how to keep their group lists up to date. Data protection laws forbid us from carrying members' personal details with us without permission, but as they are stored on Beacon, it is simple to contact your group this way.

Please encourage your members to have their emergency contact details (for example an ICE card) with them in all classes, as in an emergency it would be quicker to use than logging on to Beacon). **With their permission**, you could also store a list of their emergency contact details securely.

Some venues require the completion of an attendance sheet for use in emergency evacuation, and these must be completed before the meeting commences. At Newtown, these should be handed to

Reception no later than 20 minutes after the start of the session. In other venues, your completed register would be used.

d. Accident/incident reporting

When attending approved u3a activities, members will be covered by Public Liability Insurance. Any accident/incident must be reported to the venue owner/management as soon as possible. An accident/incident report form must be completed and handed to the Secretary, who can assist with any insurance claim. The form can be found on the national website, under Support/Running your committee, or follow the link below.

It is advised that all members carry their emergency contact details (see section 5c)

<https://www.u3a.org.uk/edocman-downloads/incident-report-form-template/download>

e. Welfare

i Group Leaders are requested to monitor the welfare and attendance of members. Members are encouraged to let their Group Leader know if they are going to be absent. If a member chooses to leave the group, the Group Leader will remove them from the register and update Beacon. This allows other members to join the group.

ii Stockton u3a's Equality, Diversity and Inclusion policy states that we will make sure that all members are aware of our policy and procedures in relation to equality, diversity, and inclusion. In particular "reasonable adjustments" may need to be made to accommodate members with particular needs. Group Leaders must be aware of this in such things as planning the arrangement of the room and when producing resources.

For the full policy, follow the link below:

<https://u3asites.org.uk/files/s/stockton/docs/stocktonedipolicy2022.pdf>

Appendix 1 provides ideas on how to address EDI matters in practice.

iii Dealing with offensive comments and other unacceptable behaviours:

If the Group Leader feels able to do so, they should respond straight away, along the lines of “Sorry, we’re not happy with that kind of comment/behaviour”. If it is not appropriate at the time, speak to the member one-to-one after the class.

If the Group Leader feels unable to do so, they should contact any member of the committee, who will discuss the matter with the Chair and a third committee member. One of the three will contact the member concerned to discuss the incident. The incident will be dealt with within a week, the Group Leader and the member will be informed of the outcome and the matter then reported/recorded at the next committee meeting.

Consequences

1. Verbal warning
2. If the group is again made uncomfortable, the member will be asked to leave the group
3. If there are further incidents, in this group or elsewhere, membership may be discontinued.

f. Closing a group

In the unfortunate event that a group seems likely to close, the Committee must be informed as soon as possible. The Committee will work with the Group Leader to find ways forward. The Group Leader will keep members informed of the ongoing discussions and final decision, and must inform the Accommodation Secretary if any forward bookings need to be cancelled.

6 Resources

Items of equipment for use by groups are held by the u3a and stored at the Newtown Centre. This includes projectors, speakers, a laptop, screen, sound system, microphones, cables and leads. If a piece of equipment is causing problems or needs replacing, please notify the committee. Printing at no cost can be done by the secretary, if notified in advance. Otherwise the cost of consumables such as paint, paper, fabric and printing must be met by the group.

The annual inspection and testing of electrical equipment is arranged by the Accommodation Secretary. A reminder will be placed in the Bulletin and an email sent to all Group Leaders at the test

anniversary. Members using their own equipment do not have the same requirement, but “Occupiers’ Liability” may occur, and regular inspection of power leads is recommended.

7 Roll of Honour

Group Leaders, as well as other members, can recommend fellow members who may be suitable candidates for the Roll of Honour. Nominees should have made a substantial contribution to our u3a, by leading a group or groups, by undertaking committee work or other outstanding contributions. For precise conditions, see the website, where a nomination form is available, or follow this link.

<https://u3asites.org.uk/files/s/stockton/docs/rollofhonournominationform-revised.pdf>

8 The Constitution

As a registered charity we are required by the Charities Commission to have a constitution. The constitution sets out the rules and responsibilities for management and membership of the u3a. It covers such things as membership, the committee, elections, property and dissolution. We have adopted the suggested constitution from the National Office, as it is legally watertight. The appended standing orders cover the day to day running of our u3a, and may be changed as necessary by the local committee.

Group leaders are a key part of the u3a and should make themselves familiar with these documents. The Chair or other committee members can help with their interpretation if necessary. Copies can be downloaded from the Stockton u3a website, links section, or follow this link.

[Stockton u3a Constitution](#)

9 General Data Protection Regulations

The protection of the personal information of individuals is a legal requirement.

We have to be sure that the way we store and disseminate information is secure, whether in hard copy, electronic record, verbal communication, images, or other means. The individual concerned should be aware that their personal information is being stored, and know the way it is being

used, before its implementation. This is covered on the membership form.

We have taken steps for compliance by producing a Data Protection Policy and Privacy Policy. These can be downloaded from our website links section, or follow the link below. Advice can be given by any committee member.

[Data Protection Policy](#)

[Privacy Policy](#)

In line with GDPR, the Beacon system is used for Group Leaders to contact their group. See section 5c.

10 Consulting the Committee

Names, roles and contact details of all the committee members are given at the end of each monthly Bulletin. Do not hesitate to get in touch if you have a query.

11 Related Documents

Stockton u3a website

Go to **Links page**

Stockton u3a constitution

Data Protection Policy

Privacy Policy

Safeguarding Policy

Groups' Timetable

Group Register

Roll of Honour Form groups

Go to **Contact page**

Membership enquiries

National website

Go to **Advice/Form Downloads**

(members sign in required)

Risk assessment checklists for Venue

Walk leaders

Workshop (Practical) Activities

Incident Report Form

Go to **Learning/ Subject Advice**

National advice for subject

Go to **Resources/ Publications**

Third Age Matters Magazine

12 Appendices

Appendix 1: Equality, Diversity and Inclusion

Appendix 2: Elm Tree Social Club emergency evacuation

Appendix 3: Fire Station emergency evacuation

Appendix 4: Grangefield/Onsite venues emergency evacuation

Appendix 5: Newtown emergency evacuation

Appendix 6: The Glebe emergency evacuation

Appendix 7: Stockton Library emergency evacuation

Appendix 8: List of Defibrillators at venues

Appendix 9: Quaker Meeting House emergency procedures

Appendix 10: List of Emergency Contacts for Venues

The appendices, above, contain sensitive data and are, therefore, to be accessed by group leaders on application to the secretary.

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