The Group Leader Role

u3a Groups vary considerably. The topics range from Architecture to Weaving and the activities range from playing Mah Jong through to Spanish Conversation and Country Walking. The size of the Groups varies from 5 members to over 50. What it takes for a group to run varies to match the group, but in common is that each group is run by members for members in line with the u3a's self-help and mutual aid principles.

The Group Leader role is to facilitate a group's meetings and membership, being aware of the u3a's policy and procedures.

The role can be undertaken by one individual or organised and shared between members of the group as the group decides. Indeed we would recommend that the activities of the Group Leader be shared in some way. A Group can have more than one person registered on Beacon as Group Leader and all will receive GL email and be able to update Group information.

Running an Established Group

How a group is run is largely up to the leader and its members, but do bear in mind the following guidance.

Leadership

It is good practice to share the leadership responsibilities. Have a deputy who can stand in for you if possible. If possible, the administration and delivery/content should be shared. Groups with active participants tend to be the most successful.

Membership

All attendees at group meetings must be Dorchester and District u3a members except that non-members can have one trial attendance. This is not only to keep our financials robust, but also to satisfy our insurance policy and Charity Commission requirements.

Note that members of other u3a's still need to be members of Dorchester and District u3a to attend meetings. Membership of a second u3a is at a reduced rate since the National u3a capitation fee is only paid once.

Our insurance specifically precludes having children at meetings.

Groups must keep a register of all attendees and send it to the Attendance Officer monthly or termly.

Managing Group Membership

We make use of Beacon to manage our Group Membership lists. Group Leaders are able to add Dorchester u3a members to their Group and remove them. They can use Beacon to email all Group Members. They can also see Group member telephone and membership numbers.

Beacon provides the facility to download the Group member list for printing or as a spreadsheet. Because this automatically confirms the Group members as current Dorchester u3a members, this is the recommended way of producing an attendance sheet.

Group Leaders have the option of allowing members to add themselves to the Group's membership or having members added to the Group's membership list by the Group's Leader(s).

In most cases, members will contact a Group Leader before coming to a meeting and can be added to the member list (providing a check of membership). If a member attends a

meeting without being in contact beforehand, the Group Leader should add them to the attendance sheet and after the meeting to the Group Membership.

Waiting lists

While our objective is that any member can attend any Groups and meetings they wish to, some groups have a natural limit on how many members. Examples are the walking Groups needing to limit the distance and time between first and last walker; reading Groups that are constrained by the number of copies of a book that can be borrowed from the library; and language conversation Groups where too many attendees would prevent active participation. The size of meeting room should not be a constraint in itself because, within reason, a larger room can be used.

Where possible, the limit can be applied per meeting and the Group manage a waiting list when needed for a particular meeting, with members left on the waiting list getting priority for the next meeting. In this case no limit of membership of the Group is needed.

Where continuity of membership from meeting to meeting is important, a limit on the membership of the Group may be necessary. In this case, Beacon should be used to manage the waiting list. Beacon records when a member has been added to a waiting list. When a place becomes available, the Group Leader can check that the member on the waiting list is still interested and if so, change their status. Advantages of using Beacon are that the process is transparent and it makes it easier for the Group Coordinator to see when an additional Group should be considered.

Finances

Groups self-finance their running costs except for room hire. In addition to the standard attendance fee, Group Leaders can collect from their group members an amount per member attending the meeting to cover tea, coffee and any other consumables required for their activity.

Leaders must keep account of attendance fees collected. There are fields on the attendance register template for this purpose. Pay all fees collected to the Treasurer (Can be done by cheque, with cash or by BACS - include Group Name as reference)

Paid u3a Tutors

We do not make use of paid tutors. It is against the ethos of the u3a. Having this policy also avoids us having to establish the employment status of a paid tutor, drawing up written agreements and monitoring the tutor's public liability insurance. This does not preclude having an outside speaker paid for a single presentation as we do for First Monday Meetings. The cost of having an external speaker for a group must be covered by the group members.

Communications and publicity

Groups need to communicate to attract new members, keep the group members aware of meeting topics, times and locations and if any changes become necessary, and to keep the wider u3a membership aware of the group's activities.

For regular group attendees: Establish with your members how you will communicate with them. For regular notifications and changes, the choice is from email, your webpage and by telephone.

Over 90% of our members have email. Please use Beacon to send email to your Group. This avoids having member email lists on our own computers because Beacon sends email to members one by one.

Every group has its basic information in the Group Directory available on our website and produced by Beacon. The Calendar, which can include meeting specific topics, venues and contacts, is also available from our website and also produced by Beacon. Both

update automatically whenever a Group Leader makes a change on Beacon to the Group's details or the Group's schedule.

Groups also have a page or section of a page on the Dorchester u3a website. Webpages can be updated at any time if you maintain your own page, or within a few days if you use a member of the web team to do updates for you. With the basic Group Information and Calendar provided by the more easily updated Beacon, webpages can be used to provide a more complete description of the Group and its activities. Groups should avoid overlaps between the information held on Beacon and that on a Group's webpage.

Where a Group Leader needs to revert to using the telephone to contact members, numbers for the Group's members are available on Beacon.

The Newsletter is our only communication that reaches all members. Published three times per year, it provides an opportunity to let the whole of Dorchester and District u3a know about your group. Send Newsletter submissions to newslett@dorchesteru3a.org.uk.

The Members' Update email is sent regularly to all members who have provided their email address and can be used for brief updates.

Also consider providing an update slide for the First Monday Meeting by email to fmslides@dorchesteru3a.org.uk. New members often use the FMM to find out about what Dorchester and District u3a does.

Day Trips, Study Groups and Holidays

For groups wishing to organise an outing, we have a number of rules to comply with our charitable status and avoid legal issues.

Finances:

1. If each member makes their own way to a venue (theatres, cinemas, etc.) and pays their own entrance costs (and has whatever insurance is appropriate), then the costs do not need to appear in the u3a accounts

2. If the outing organiser is planning to organise the travel and venue for the group, then please contact the Treasurer before making any booking. If the organiser arranges a trip which includes, for example, the transport and ticket price, and the transactions are routed through the u3a bank account, then the costs must be included in our financial accounts.

The cost of an outing should be shared equally by those participating including the Group Leader.

In order to avoid losing money:

• Decide on a minimum viable booking number and calculate the cost per person on this basis. If more members join the outing, the extra money should be refunded.

• Set a deadline date for receiving payments from members booking. If you have not had the minimum viable booking number by this date, then cancel the trip. The deadline date should be set such that coaches or other reservations can be cancelled without incurring a charge.

• You may consider offering places on the outing to associated organisations two weeks (say) before the deadline if you are clearly going to have places. People who are not u3a members must pay an extra amount (refer to Dates and Rates) for the day's membership.

If we run more than 10 trips longer than a day per year or offer our trips to non-members (of any UK u3a), we lose our exemption from the UK Package Travel regulations. The regulations impose a number of obligations and liabilities not appropriate for the u3a.

Group Leaders must report all trips longer than a day to the Treasurer to ensure we comply with the rules.

For Study Group trips, the Third Age Trust has arranged tour operating liability insurance.

All holidays organised by the u3a must be organised through a travel agency / tour company so that we are covered by their liability insurance. It is preferable that payment to the travel agency is made by each member individually in order to make any potential claims more straight forward.

As long as the basic procedures outlined above are followed, then the liability insurance the Third Age Trust provides will cover the day events and study group overnight trips in the UK and Europe, both with respect to third party liability, the group organiser and member to member cover. It must be clearly understood, however, that it does not include personal accident/injury or travel insurance, both of which are the personal responsibility of each u3a member to take out. If we wish to extend an invitation to members of other u3as that is fine.

Equipment

We have a set of laptops and audio-visual equipment for use by groups. Details of the equipment available for GL use and the procedure for borrowing it can be found on the "Borrow Equipment" page or obtained from the Equipment Officer.

Safeguarding

There is the remote possibility that you suspect a member is being subject to abuse or neglect. If someone discloses abuse to you, listen and be sympathetic. Inform a committee member as soon as possible. Our safeguarding policy provides detailed guidance and can be found on our website.

Risk Assessment

Leaders must undertake risk assessments for group activities at a level appropriate for the activity. This means, for example, for a regular activity in the same room, each time you enter the building take a few moments to identify any changes that might pose a hazard. Refer to the Third Age Trust Venue Checklist (day of use) in the appendix to see the various checks that might be appropriate for your meeting.

For new or changed activities or venues, and certainly for outside visits, a more systematic risk assessment is needed. Risk assessment checklist for venues and walks are in the appendix and for various other activities are available on the National u3a website (login required).

Emergency Procedures

Please ensure you are familiar with the alarm, fire exits and assembly points for the venue you are using. These are generally available at the venue often on a notice board. In the event of evacuation, use your attendance register to ensure no one has been left behind.

Incident reporting

We require an incident report form to be completed for every injury and item damaged, both to comply with our insurance policy, but also to help us learn from experience. The form (See forms page) should be filled in by a member of the committee, a group leader/ contact, or the property owner and should submitted to the Secretary or other committee member within 24 hours of the incident.

Keeping Legal

Copyright material: Our CLA license allows you to copy up to 5% or one chapter/article from eligible books, journals and magazines per licence year and per group, to share with group members and include in presentations. Check eligibility by entering an ISBN into the Check Permissions tool on the CLA website (www.cla.co.uk).

Unless you are sure that material (books, photographs, pictures etc.) is covered by our CLA license or is out of copyright, you must not photocopy it. The copyright on most literary and artistic work expires 70 years after the author dies and, in addition, copyright of the typographical arrangement of a published edition of a work expires after 25 years. A detailed description of copyright rights and rules is provided on the National u3a website: Copyright and Licences - u3a-KMS-DOC-009.

Performance of and listening to music: We have a PRS License covering playing music at our meetings from a radio, TV, CD, MP3, computer, live music. The license is held by the Treasurer.

Data Protection / General Data Protection Regulation (GDPR): As a membership charity, we collect a limited amount of personal data about members in order to inform them about activities relating to membership - name, postal address, telephone numbers, email address, gift aid information. This is permitted under GDPR as a legitimate interest. Groups may wish to collect additional information from members and can do so if the data is needed to support the group's activities AND the members are aware of the reasons why the information if needed. Note that photographs are personal data and consent is required for both taking and displaying. Our members have every right to know what data we collect, how we use it and for it to be deleted.

Keeping Data safe: Not only because it is a legal obligation, but also to safeguard our members, we must take all reasonable steps to avoid personal data from reaching third parties. This means storing personal data in as few places as required for our operational needs and storing data on systems with strong individually held passwords. We should not keep personal data on the shared u3a laptops and as a practice, we use the Beacon for email to limit the spread of email address lists.

Insurance

As a u3a affiliated to the Third Age Trust, we benefit from insurance policies taken out by the Third Age Trust:

Public and products liability. This insures us against liability for:

• Accidental injury to or death of any person.

• Accidental loss or damage to material property not belonging to us (u3a and members), which arises or is caused in connection with the 'business' of the u3a

The insurance specifically excludes use of motor vehicles and loss or damage to property in our control.

Tour operators' liability insurance: provides insurance for short study trips.

Equipment insurance: insurance against loss or damage to u3a equipment in transit and wherever held as long as kept in locked cupboards or member's homes (£250 excess).

Home Contents insurance: covers damage to the property of any u3a member whilst their home is being used to host a u3a event. (£250 excess)

More detail of our insurance can be found on the National u3a website: Insurance Overview - u3a-KMS-DOC-013.

Problem solving

Sometimes issues can arise within a group that disrupt the smooth running and spoil the enjoyment for everyone. Don't leave a problem too long before trying to resolve it. Talk to the Group coordinator or Committee if you are unsure how to resolve the problem or just want someone to explore options with. You can also ring National Office (020 8466 6139) if you want to talk something through or check something out.

Issues between group members

Where there is potential for friction it is advisable to begin by bringing it into the open. Either you or another person could try to facilitate a discussion either with the members concerned or with the whole group, but it is important that the facilitator remains neutral and non-judgemental. If you cannot reach a resolution informally speak to the Group coordinator or a member of your Committee. If a situation does not resolve and becomes acrimonious your Committee can consult the advice on disciplinary procedure provided by the Third Age Trust.

Resources and Help

Whatever your question or need, someone already has the answer. Here is a list of sources you can call:

Committee Members: are a good start point for most questions and specifically the Group coordinator for group related questions. Contact details for all are on our website in the menu ABOUT US / CONTACTS and also in each Newsletter.

Group Leaders: Other Group Leaders may have had the same issue or need. The Group Leaders' meeting is there for answering Group Leader questions.

National Subject Advisers: There is a network of over 70 national subject advisers, whose role is to provide advice on both the setting up of a group in their particular speciality and the sustainability of ones already in existence. For the list and contact information, see the Third Age Matters magazine or on the Third Age Trust website www.u3a.org.uk/learning/subjects.

Other u3as: There are over 1000 u3as in the UK and there is a good chance that one of them is already doing what you are planning (The development of this document benefitted greatly from reviewing a number of GL handbooks from other u3as as well as the template from the National u3a website). Links to the websites of local u3as are provided on our website menu RESOURCES / LOCAL u3a GROUPS. For others, try using Google.

National u3a Office: the staff team are available Monday to Friday to offer support: www.u3a.org.uk/contact

Other Learning Resources: We have links to a number of museums and libraries etc. on our learning resources page. Menu RESOURCES / LEARNING RESOURCES.

Taking over the GL Role of an existing group

In most cases, the retiring Group Leader will be available to support their successor, but if they are or will become unavailable, make sure you find out the logistics of the group:

• The list of members and how the group communicates

• Where the group meets, gaining access to the meeting room

• Equipment used

• What have meetings covered in the last year (or other appropriate period)

• Who maintains the group webpage and how it is used.

As a new Group Leader you will have your own ideas about what the group should do and how it should work, but do take the opportunity to consult with the Group over directions. See Refreshing a Group for an approach.

Starting a new Group

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.

In the first case discuss your idea with the Group Coordinator. The Group coordinator will guide the process of starting the group with the steps below depending on circumstances:

- Generate and test for interest in the idea, announcing in the First Monday Meeting, in the newsletter, Members' Update email and website and make a list of interested members.
- If the Member suggesting the new group is not willing to run the group, then identify a Group Leader for the prospective group.
- Discuss (Group Leader, Group coordinator and Treasurer) the expected running costs for the group and whether it will all be funded centrally or if group members will need to self-fund.
- Hold an initial meeting, agenda including the following numbered points:
    1. Discuss the purpose of the group.
    2. Check for skills within the group.
    3. Agree, if relevant, the level that the group will be aimed at – beginners, improvers, advanced.
    4. Agree the tasks that need doing to run the group and who is willing to support these – who is willing to help with the programme or support the administration.
    5. Agree how the group will work – discussion, instruction, presentation etc.
    6. Agree when and where the group will run.
    7. Identify any accessibility needs that group members may have.
    8. If the group will need to self-fund, agree the costs for running the group and what members will need to pay.
    9. Discuss how group members will communicate with each other
- Discuss meeting room requirements with the Venues Officer and request bookings.
- Discuss equipment requirements with the Equipment Officer and make reservations.
- Update all interested members, and announce at the First Monday Meeting and in the Newsletter.
- Arrange for access to Beacon with the Beacon Administrator.
- Arrange for a group webpage with the Website Coordinator.
- Start Meeting!

Refreshing an existing group

It is quite normal for a group to become stale and stuck in a rut at some point. Every year, consider if it is time to review how the group is working. Consider having a debate with group members on one or more of:

- Purpose: Has the group strayed away from its intended purpose? Are members happy with the purpose or would they like to modify it?
- Content: is there a different area (topic, skill, activity) that the group can explore?
- Delivery: can the format of meetings be varied? Lectures, teaching vs. Discussion; Theoretical vs. Hands-on practical; meeting room vs. Field trip.
- Membership: would the group benefit from having new members? Is it time for a more active recruitment campaign?
- Leadership: Can another group member lead one or more meetings to bring a different style.
- An event: having a special speaker, a special outing, a short course.

• Everything: it might be productive to have a more general discussion with the group. Hold a creativity session with members on what they would like to do more of, less of and what to continue as is.

Checklist for Every Meeting

<u>Meeting notifications</u>: establish a way of communicating with regular attendees. Beacon can be used to email your members avoiding the need to collect email addresses. Inform your members of meeting topics and any changes to meeting timing and location. Update your Calendar on Beacon. The Members' Update email provides a way of letting most members know of changes.

<u>Meeting Cancellations</u>: Meetings that are cancelled should have "CANCELLED" in the topic of Beacon calendar entry. The cancellation should also be reported to the Venue Officer as soon as possible to avoid room cancellation charges. If you manage your own venue bookings, please cancel with the venue.

<u>Attendance register</u>: at the start of each meeting record the names and membership numbers of attendees (members and trial members). Send your register to the Attendance Officer termly, ideally in electronic format (spreadsheet, pdf, or list in an email).

<u>Membership validation</u>: all meeting attendees must be current Dorchester u3a members or a non-member attending once to decide whether to join the u3a. Confirm that attendees are current members by adding them to your group's members list on Beacon (If you can't find them, they aren't a member).

<u>Meeting attendance fees</u>: Meeting attendees, except the Group Leader, pay a fee for each meeting attended. Collect the fees, record the amount collected and pay it to the Treasurer no less frequently than termly. The current rates are published in the newsletter and in the website Group Directory.

<u>Equipment use</u>: each time you use u3a equipment that you have reserved, log it out on the clipboard in the cupboard and log back in when returning. Please report any equipment issues to the Equipment Officer.

<u>Leaving a Meeting Room</u>: Leave meeting rooms tidy and, if appropriate, locked.

<u>Safety considerations / risk assessment</u>: every time you will undertake a new activity, meet in a different environment or have different people involved, take time to assess what could reasonably be expected to cause harm. If you do identify a hazard, get rid of it or advise members to avoid it. Unless the hazard is temporary, inform our Venues Officer or Equipment Officer as appropriate.
Advise your members of any hazard identified and inform attendees of the fire procedures regularly and every time a member attends for the first time.

<u>Injury and damage</u>: in the event of an incident, obviously the priority is to keep people safe and get treatment for any injuries. As soon as possible after the well-being of those present has been assured, collect details of the incident and complete our incident report form (see forms section of Group Leader Reference). A report is required for every injury and item damaged for our insurance*. Please send your report to the Secretary within 24 hours of the incident.

<u>Copyright and Photocopying</u>: Please stay within copyright rules. We have the use of a photocopying facility at the Dorchester Volunteer Centre, The Coach House, Acland Road, DT1 1EF - open Monday to Thursday. On arrival, sign in and inform staff you wish to use the photocopier. Record number of copies made in black book to the left of the machine. If you plan to make more than 40 copies, please first discuss with the Treasurer. (It is worth phoning to check it is open - 01305 269214)

Meeting issues: we hope all your meetings go well, but if one is marred by, for example, some conflict and you would like to discuss the incident, please contact Group Coordinator or another committee member.

Member issues: if you become aware of a member having an issue needing support, please consider raising the matter with our Welfare Officer. If someone discloses abuse to you, listen and be sympathetic, and inform a committee member as soon as possible. Our safeguarding policy provides detailed guidance and can be found on the website.

New members: Do make new members feel welcome, explain how the group works and ask members to introduce themselves.

Trial members: Make sure trial members (non-members attending your meeting once to see if they would like to join) know how to join the u3a. Details are on the website, or available from the Membership Secretary.

Checklist for every Term

Calendar and Venue booking:

This section covers the way in which each group's meetings are entered into our website calendar and the newsletter timetable, and meeting rooms are booked for (at least) the term ahead.

About 4 weeks before a term starts (GLs will get a reminder) each group must update the group's schedule in Beacon to include all the meetings for the term. This information appears automatically in our website calendar. It is also used to produce the newsletter timetable.

The Venues Officer manages room bookings for:

• HTPC classrooms

• Dorchester Community Church

• Dorset Youth Association

• Sandringham Court

If your group uses one of these venues, the Venues Officer will make the booking on the basis of your schedule in Beacon.

If your group does not use one of these venues, then you will need to make your own booking directly with your venue.

Equipment Reservation: u3a equipment must be reserved every term to ensure its availability. Details of equipment available can be obtained from the u3a website or by contacting the Equipment Officer. Please make your requirements known to the Equipment Officer.

Newsletter: The Newsletter is the only communication received by all members. Consider putting an article. photograph or update in the newsletter - what has the group been up to? What will the group be doing in the next term?

Webpage update: Many groups use their webpage to share the meeting programme and status. Take time to check whether your page will still be relevant for the term to come.

End of Term Tidy-up: At the end of each term, check whether you have submitted all your meeting attendance sheets, paid all collected fees to the Treasurer and submitted expenses.

Using a venue for the first time

If you are to use a meeting room for the first time, consider:

- • Is it accessible for all your members?
- • Will it work for your activities?
- • Is there sufficient room for your expected numbers?
- • Is any equipment you need available at this location?
- • Are there any specific constraints (e.g. food and drink consumption) that will prevent your normal activities?
- • Do you know how to get access to the venue/room?
- • Do you know the emergency procedures (fire alarms, emergency exits, meeting points)?

Some of this information is available in the Venues Document, but contact the Venues Booking Officer for additional information. You may also wish to visit the meeting room ahead of your meeting.