

# Group Leader Reference

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## 1. Introduction

This document complements the “Group Leader Checklists” by providing additional information and detail. The documents have some overlap for ease of reading, but should be considered as two parts of the whole. They can be read on or downloaded from the Dorchester u3a website or obtained as a paper version from the Group coordinator.

## 2. The Group Leader Role

u3a Groups vary considerably, with topics from Architecture to Weaving, nature of the activity from playing Mah Jong through Spanish Conversation to Country Walking and in their size from 5 or 6 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 manage the organisation and delivery of a group’s meetings, following the u3a’s policy and procedures. These are set out below and in the “How the u3a Works” document.

The Group Leader 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. We do need a single contact with the group for communications. Where this person is not undertaking the full Group Leader role, they can signal this by being called Group Contact.

## 3. 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. To the extent possible share both the administration and content delivery activity. Groups with active participants tend to be the most successful.

### Membership

All attendees at group meetings must be Dorchester and District u3a members or, for a single visit, guests. 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.

Groups must keep a register of all attendees and send it to the Treasurer monthly or termly, ideally in electronic format (spreadsheet or list in an email). A template is provided in the appendix.

### Waiting list

If, when a new member inquires about joining your group you are unable to accommodate them, advise them that you have a waiting list and will discuss with the Group coordinator how they might be accommodated. Take their details and keep a list of members who wish to join your group. Inform the Group Coordinator and keep members on the waiting list informed on a regular basis. An interested member can either join your group later if a place becomes available, or a new group with a new leader can be formed to meet the demand.

### Finances

Groups self-finance their 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)

## Expenses

Group Leaders should not be out of pocket for carrying out their role. Items the Group Leader requires to perform their role are usually paid for out of u3a funds. If there is any doubt about whether the u3a will pay for an item, please check with the Treasurer. Typical items covered are books and CDs, printing costs, but not table tennis balls.

Group Leaders do not require pre-authorisation to purchase items of value up to £20. Purchases of greater value than £20, must be approved by committee. Send requests with cost details and benefit to the group to the Treasurer.

Expense claims with receipts should be submitted to the Treasurer.

## 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 the BCC address field in your email system for members' addresses so that the risk of a list of our email addresses getting into the wrong hands is minimised.

Each group has 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. If using your page for meeting changes, make sure your members know to check. In addition to the webpage, each group has an entry on the timetable page. Please advise the Website Coordinator when meeting dates change so that the timetable can be updated.

The telephone obviously works for everyone, but takes more time.

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 [newsletter@dorchesteru3a.org.uk](mailto:newsletter@dorchesteru3a.org.uk).

The Members Update email is sent regularly by the Membership Secretary 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](mailto: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 (also see Keeping Safe for risk assessment).

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 can be found on the website or obtained from the equipment officer. Any regular use of equipment should be reserved on the equipment rota before the start of each term. The reservations on the rota will be rolled over to the following term. Any changes to regular use should be sent to the equipment officer as soon as possible. The rota for each term will be available on the website and on clipboards in the equipment storage cupboards to allow for occasional booking out of equipment.

Any GL who wants one off or occasional use of equipment should reserve it in advance on the Reservation form on the clipboard. When making a reservation GLs should check the rota to make sure it is available for the date and time required.

All equipment going off site i.e. away from the building storing it, MUST be booked out on the clipboard, and returned as soon as possible and certainly before the next use.

## Keeping Safe

### 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 appendix) should be filled in by a member of the committee, a group leader/contact, or the property owner and should be 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, 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](http://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 is 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; 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 email BCC address field 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: insures us against liability for:

- Accidental injury to or death of any person.
- Accidental loss or damage to material property not belonging to the us (u3a and members), which arises or is caused in connection with the 'business' of the u3a

The insurance specially 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 at website [www.u3a.org.uk/learning/subjects](http://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](http://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.

## 4. Taking over 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 is it 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 group over directions. See Refreshing a Group below for an approach.

## 5. 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, email update and website and make a list of interested members.
- If not the idea originator, 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 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 a group webpage with the Website Coordinator.
- Start Meeting!

## 6. Refreshing a 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.  
Brainstorm what members would like to do more of, less of and what to continue as is.



## **Appendix - Forms and Checklists**

- Attendance
- Incident report
- Venue Checklist (Day of Use)
- Venue Risk Assessment Checklist
- Walk Leader Risk Assessment Checklist



## Dorchester and District u3a Incident report form

Please note that this form is to be filled in by a member of the committee, a group leader/contact, or the property owner and should be retained on file by the u3a committee in case of a claim and for a period of three years even if a claim appears unlikely.

### 1. Your details

<b>Name</b>	
<b>Position</b>	
<b>Email</b>	
<b>Telephone</b>	
<b>Address</b>	
<b>Postcode</b>	

### 2. Incident details

<b>Date of incident</b>	
<b>Time of incident</b>	
<b>Where did the incident occur?</b>	
<b>Please state the reason for the injured person or damaged property being there</b>	
<b>Please describe the circumstances of the incident</b> <i>Attach a sketch or photograph(s) if possible</i>	

### 3. Particulars of person(s) involved in the incident (continue on a blank page if necessary)

Name	Email
Address	
Postcode	Telephone
Was he/she a member of your u3a on the date of the incident?	
Name	Email
Address	
Postcode	Telephone
Was he/she a member of your u3a on the date of the incident?	

Sections 4 and 5 are to be completed for any incident involving injury.

### 4. Particulars of the injured person(s) (continue on a blank page if necessary)

Name	Email
Address	
Postcode	Telephone
Was he/she a member of your u3a on the date of the incident?	
Name	Email
Address	
Postcode	Telephone
Was he/she a member of your u3a on the date of the incident?	

### 5. Details of injury

Describe the injury/injuries
Immediate action taken
Treatment at the scene
Admission to hospital

Ongoing medical treatment
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*Section 6 is to be completed for any incident involving damage to property*

## 6. Details of damaged property

Describe damage caused	
Estimated cost of repair or replacement	
Name of owner of damaged property	
Email	Telephone
Address	
Postcode	

*The remaining sections are to be completed for all incidents:*

## 7. Name and contact details of any witnesses to the incident


## 8. Declaration

I/We declare that to the best of my/our knowledge and belief all the foregoing particulars are true and correct in all respects.	
Signed	Dated

# Venue Checklist (Day of Use)

<b>Dorchester and District u3a</b>	
Group	
Date	Location
Description of Activity	

Check	Yes (✓)	
1	Emergency Exits unobstructed	
2	Emergency Exits unlocked	
3	Fire Extinguishers in place	
4	Toilet facilities open, clean, paper available etc	
5	Walkways free from trip hazards	
6	Kitchen facilities accessible & clean	
7	Kettle leads in good condition, free from wear and fraying, plug securely attached	
8	Refreshment items available	
9	First Aid equipment accessible	
10	Safety Briefing given <ul style="list-style-type: none"> <li>a. Emergency exits</li> <li>b. Assembly point</li> <li>c. What to do if fire discovered</li> <li>d. What to do if the alarm sounds</li> <li>e. Accident / injury reporting</li> <li>f. Toilet and washing facility location</li> </ul>	
11	Other (specify)	
12	Other (specify)	

<b>Notes</b>
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<b>Signed</b>	<b>Dated</b>
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# Venue Risk Assessment Checklist

<b>Dorchester and District u3a</b>	
Interest Group	
Date	Location/Postcode
Description of Activity	

Hazard	Yes	No	N/A	Comments
1				Is the access suitable for the group attending the activity especially anybody with limited mobility?
2				Is wheelchair access adequate?
3				Is the area free from obstructions & trip hazards?
4				Are there adequate means of escape in an emergency?
5				Are there appropriate direction signs to aid escape?
6				Is there a Fire Alarm?
7				Is there Emergency Lighting?
8				Is there a designated assembly point? Where is it?
9				Is there an emergency procedure for the building? Do you have a copy?
10				Is seating always laid out?
				Is it a u3a responsibility before and after the activity to lay out seating
11				Is there a kitchen?
				Is the kitchen adequate and hygienic?
				Are food safe cleaning materials available?
				Has the kettle been visually safety checked?
12				Are the toilet facilities adequate & accessible?
13				Is equipment being brought to the venue?
				Has it been checked?
14				Is there a First Aid box and if so where is it located?
15				Does it have a sound system with an induction loop?
16				Other (define)
Additional information:				

Signed

Dated



# Walk Leader Risk Assessment Checklist

<b>Dorchester and District u3a</b>	
Interest Group	
Date	Walk Name
Distance	Terrain Type

<b>Before the walk</b>		<b>Yes (✓)</b>
1	Provision of information to prospective walkers: <ol style="list-style-type: none"> <li>a) Location</li> <li>b) Distance</li> <li>c) Timing</li> <li>d) Linear / Circular Route</li> <li>e) Terrain</li> <li>f) Height and climbs involved</li> <li>g) Level of fitness required</li> <li>h) Identification of any 'break off' points (e.g. if members feel unable to continue)</li> <li>i) Appropriate footwear &amp; clothing</li> <li>j) Toilet / refreshment facilities en route</li> <li>k) What to bring – food / drink / compass / map / mobile phone</li> <li>l) Dogs permitted?</li> <li>m) Meeting point</li> <li>n) Public transport options</li> <li>o) Car parking facilities</li> <li>p) Need of walkers to bring emergency telephone numbers for next of kin and relevant medical details</li> </ol>	

<b>On the day</b>		<b>Yes (✓)</b>
1	Check first aid kit & emergency blanket. Identify any first aiders.	
2	Briefing before starting out: <ol style="list-style-type: none"> <li>a. Route</li> <li>b. Duration</li> <li>c. Terrain</li> <li>d. Known Hazards</li> <li>e. Emergency Arrangements – illness, exhaustion, accident, weather problems, terrain problems, lost contact with group</li> <li>f. Be prepared to advise inadequately equipped walkers not to go but they must make the final decision</li> </ol>	
3	Appoint a backmarker	

<b>During the walk</b>		<b>Yes (✓)</b>
1	Stay at the front but make sure you can always see the backmarker	
2	Set an appropriate pace for the level of walk	

3	Check the route frequently	
4	Periodically count the number in the group	
5	Other(specify)	

### Exceptional Circumstances

There may be reasons why additional conditions may have to be taken into consideration when completing this risk assessment.

When completing a risk assessment in exceptional circumstances you need to consider how this will impact on the activity, what additional measures or changes you will need to make for each identified hazard in order to reduce risks involved in running the activity. These changes will need to be incorporated into the assessment of how hazards can be reduced or avoided to respond appropriately to the exceptional circumstances you are facing.

Notes for exceptional circumstances:

<b>Signed</b>	<b>Dated</b>
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### FURTHER NOTES