

Purbeck U3A

Group Leaders Handbook

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Section 1- Introduction

Purbeck u3a offers many and diverse interest groups. Some may have half a dozen members, others have 40+. Some meet in members' homes; others in village halls throughout Purbeck and some meet out in the fresh air. All have a common aim – **Learn, Laugh, Live – the U3A ethos.**

This handbook is for Group Leaders, whether you are new to the role or have been running a group for a while. Many of you may not be aware of the resources available to help with the running of your group. Also, some of you may not be aware of a few minor but necessary duties which are your responsibility as Group Leader.

This handbook should provide the answers to all – or most – of your questions. The IT Administrator will provide you with access and a password to the Beacon Administration website (u3abeacon.org.uk) which is the u3a administration system. (See Section 4).

Please read the handbook in conjunction with the Beacon website and the Purbeck website (purbecku3a.org.uk) which provide updates on group activities and forthcoming events. It will help with the smooth running of your group.

The responsibilities of the Group Leader are not designed to be onerous but provide a framework to run a harmonious group in an efficient manner where everyone enjoys the experience of meeting with like-minded members. There is further information on the National u3a website – (u3a.org.uk) – an invaluable resource offering various events, podcasts and online training opportunities. Reference can also be made to Committee members and the Group Leader Coordinator who are all there to support.

A Group Leader should be a 'paid-up' member of the u3a.

Details of Committee members are on the Purbeck u3a website under Contacts, and on the Beacon site (u3a officers)

[Purbeck U3A](#)

[U3A Administration \(u3abeacon.org.uk\)](http://u3abeacon.org.uk).

Section 2- 'The 10 Key Points' – useful tips

The following 10 Points should give you a useful starting point and help you think through the structure and organisation of your group. These points are not written in stone and all groups are different, but they should provide some useful tips.

1. Take advantage of the support, resources and templates available to Group Leaders from Purbeck u3a, National u3a and the Third Age Trust. (The Third Age Trust is the national representative body for the University of the Third Age movement in the UK).

2. Take the opportunities provided through Purbeck u3a to meet and network with other Group Leaders to share experiences – and problem solve (if necessary).
3. Help members to be clear about the purpose of the group, the role of the Group Leader and the expectations of the group.
4. Where possible, ensure that you can focus on group leadership by identifying and delegating administrative responsibilities. Share the workload.
5. Draw on the strengths in your group. Encourage active participation and invite group members to present or share their own ideas and interests.
6. Share responsibilities among group members from the outset and encourage greater involvement from all members – seek deputies.
7. Help to dispel the idea that being a Group Leader is daunting. Remind members that group leadership is a shared responsibility.
8. Clarify how the group will operate when the leader is absent. Identify a member of the group to deputise and, if possible, to succeed you as leader, should this be required.
9. Encourage group members to get to know each other and welcome new members. In larger groups - name labels can be helpful.
10. If a group becomes very large, or there is a growing waiting list, discuss with the Group Coordinator the possibility of developing an additional group which may be at a different level e.g. beginner/intermediate.

Section 3- Leading the Group

Remember that shared learning means shared responsibilities – you are not alone!

Sources of support

There are many sources of support available to you. These include: the members of your group, your Group Coordinator (or other Committee members), the extensive services of the Third Age Trust and workshops and networks provided by local associations which will link you with group leaders from other u3as. In addition, Purbeck u3a runs meetings for Group Leaders. Purbeck also has a reciprocal arrangement with Upton & Lytchett u3a to share resources.

An Overview

There is no common curriculum and no syllabus to follow. Each group sets its own schedule and diary of events, according to need and interest. It may include more formal occasions with lectures or speakers, or it may operate more informally. It is the responsibility of those

who lead these groups to try and provide the best possible environment for learning to take place.

Preparing for the first meeting

Find out what help is available locally and nationally. Talk to your Group Coordinator. You can also contact the National Subject Coordinator through the national website (u3a.org.uk).

It may be useful to have a handout for the first meeting in the form of a statement of intent setting out the aims of the group, how it will operate etc. This focuses the group and encourages shared responsibility.

At the first meeting

At the first meeting, ask people to introduce themselves, say why they have joined and what they hope to achieve. It can also be helpful to find out what knowledge, experience and skills exist within the group.

A successful group will be clear about and share expectations. If there is a statement of intent, this will help to keep the group on track and will inform potential new members.

Agree frequency of meetings, how the group will meet / operate and what sort of learning methods will be used. Many methods are used in u3a, including speakers, members teaching the group, shared presentations, discussions, skills demonstration, field trips or visits to sites of interest.

Section 4 – Beacon and record keeping

Beacon is the u3a administration system - [U3A Administration \(u3abeacon.org.uk\)](http://u3abeacon.org.uk).

The Beacon database is the main repository of data for Purbeck U3A and includes all member, group, venue and finance details etc. (Note that it does not hold policy documents or forms.)

Generally only members who are (or have been) group leaders will have access to the Beacon database.

For general help on how to use the Beacon system refer to the Beacon User guide which can be accessed via a link at the bottom of the home page in Beacon after you have logged in. There is also a link below.

Contact the Beacon Administrator for any queries that are not covered by the user guide e.g. requests for a new user id, password reset etc.

As a group leader you will automatically have access to all member details of your group.

It is your responsibility to maintain:

- the group details (venue, meeting frequency etc.) held on Beacon pertaining to your group. (Note that these details should also match what is reported for your group on the PU3A website)
- a list of active members of your group (plus any members on a waiting list)

It is recommended that you use Beacon to communicate (by email) to your group members.

There are two key advantages to using Beacon to do this:

1. Beacon will always use the most up to date contact information for a group member.
2. It will also send the email to each group member without disclosing the email addresses of other group members.

There is a comprehensive guide on Beacon on how to use it which can be accessed at the link below. This includes how to add members to groups and use Beacon to send emails.

[User Guide – u3a Beacon \(zendesk.com\)](#)

As a charity we need to retain basic records. It's therefore important to keep records of each meeting. Records may vary depending on the group but will typically include the following:

- Venue / location
- Names of attendees
- Date, time, duration and frequency of meetings,
- Size / numbers of group (any requirement for a waiting list)
- Contribution of group towards materials, refreshments etc. (Some groups may ask for a small contribution from members to cover costs)

See example record keeping sheet in Appendix.

The Treasurer needs to be kept up to date with details of venue booking, group members etc.

You should email the Treasurer in the following circumstances:

- When booking a venue for which there is a charge as this requires pre-approval
- Quarterly, with a list of hall bookings and dates for the next quarter
- All issues relating to capital expenditure (eg: equipment hire)
- All issues relating to expenses

Problems/Grievances

If you have a problem with your group, contact your Group coordinator to discuss how to proceed.

Section 5 – Equipment, capital expenditure and expenses

Equipment

We wish to support our Groups, and further develop Purbeck u3a, by purchasing material or equipment where it's needed, but all purchase requests should be directed to the Treasurer in the first instance - treasurer@purbecku3a.org.uk.

The general rule is that consumables, costs for speakers, etc is paid by the group itself. Where an external speaker is required, usually the Group Leader sets up a 'Speaker's fund' and members contribute £2 - or whatever is considered necessary – at each meeting.

Low-cost consumables, such as stationery (including photocopying) - less than £5 - can be claimed by emailing the treasurer, without prior permission.

A list of the equipment held by the Purbeck u3a is maintained by and available from the Treasurer.

Capital expenditure

Expenditure for equipment or other necessary items for the group should not be purchased without prior consent by the Treasurer. The Purbeck u3a Treasurer is happy to discuss and advise on this subject. Purchases made without agreement may not be reimbursed.

Permission will normally be granted unless the request is for material or equipment more than £50 or if there is any doubt as to whether the purchase is for the general benefit of Purbeck u3a. In these cases, the matter will have to be referred to the Committee. This should not delay matters and should not have to wait until the next committee meeting. In most cases it should be possible to canvas opinion from all committee members by WhatsApp, without formal discussion.

Expenses

Travelling on u3a business should be approved by the Treasurer in advance and will be reimbursed after discussion with the Treasurer. This does not include travelling to Group or Committee Meetings.

Expense claims should be emailed to treasurer@purbecku3a.org.uk or given to the Purbeck Treasurer. (See claim form in Appendix). Please include your bank account name, number and sort code, together with details of claim (eg: stationery, postage) so reimbursement may be made electronically to your bank account. Your details will be held in a safe environment.

Section 6 – Venue Booking and Payment Policy

Generally, a venue is required when:

- the group is too large to fit into a member's home

- there is no member's home suitable for accommodating the group
- the type of group activity is not suitable for a member's home.

The general rule of thumb is that meetings with fewer than 10 members should ideally be held in a member's home or a local café.

If you need to use or hire a venue, Purbeck u3A funds will cover up to 30 bookings for the period September – August (school / academic year). This policy is subject to annual review. Where you require a venue for more than 30 bookings per financial year, members may need to make a contribution. You should discuss this with the Treasurer.

On Beacon there is a list of all venues available in the Purbeck area. They are all used by Purbeck u3a so those responsible/caretakers should be familiar with the process and charges. The aim is to use the most cost-effective option.

Check the availability of dates and the facilities offered – kitchen areas are sometimes a separate cost, so you need to confirm that this is required as well. Some offer secure storage areas for equipment and most of the bigger halls have A/V systems – all matters to consider. Don't forget access arrangements, keys, fire safety, etc.

Some venues invoice u3a so please check the cost of the hire and method of payment then inform the U3a treasurer of your arrangements, including starting date to treasurer@purbecku3a.org.uk You will then receive confirmation of your booking.

Section 7- Networking/ Communications

Meeting Point is a network event held on the 4th Thursday of every month at Harman's Cross Village Hall. It is open to all members and even non-members.

As well as having a very interesting speaker at every meeting, it is an ideal place to meet and talk with other members as well as committee members, this could be for advice, information or purely social. It is also an ideal opportunity for a few minutes 'mike' time if you would like to announce something to the room. People tend to take more notice of a live announcement – it carries more weight. The opportunity to answer questions is also useful.

Contact the Group Co-ordinator if you wish to make an announcement about your group.

Website postings/bulletins

Group Leaders may submit requests to post notices on the website of the Group's program of events, special dates, activities of interest or where a Group wants to encourage new members. All notices should include the group and group leader's name. You should email news@purbecku3a.org.uk.

National u3a Advice Sheets

The national website has numerous advice sheets, from guidance to assist those with disability, to the u3a Equal Opportunities Policy to promote diversity and inclusion, to licensing and copyright. These sheets can be circulated to members for guidance and information.

Section 8- Health and Safety/Insurance

Health & Safety

Group Leaders are responsible for all aspects of their groups. For example:

- Time, date and place of meeting and suitability of facilities.
- Advising members of Health and Safety issues at the start of meetings (e.g. fire exits; emergency meeting points; use of electrical/mechanical equipment)
- Keep a consolidated record of who is present at each session.
- Each year check all members are paid-up members of the u3a and thus insured against public liability claims should an issue arise.
- Keep the committee informed of any unresolved issues

Insurance Details

- a) The Third Age Trust insurance brokers, currently Arthur J. Gallagher, provide insurance to the u3a which includes: Public & Products Liability, Home Contents, and Trustee Management liability. (Full details are available on the u3a National website members' page).
- b) Paid up members (and carers) are covered for public and products liability while on u3a business. The insurance covers Home Contents when there is damage to the property of any member whilst their home is being used to host a u3a with an excess of £100. The insurance also covers u3a assets when 'equipment is kept in a locked cupboard or room when the premises are not in use by the u3a with an excess of £100. Personal Accident insurance is not included.

Health and Safety incidents

It's important to remember that health and safety incidents can and do occur. If in doubt phone 999.

The following provides some general guidance:

- Assess the nature of incident
- Seek assistance from qualified group members if there are any
- Phone 111 if the person is conscious and follow the advice given

- Phone 999 if the person is unconscious, having sudden onset of chest pain or breathlessness, or sudden loss of use of part of body, including speech.
- Err on the side of caution when it comes to seeking or phoning for advice or assistance
- Contact the person’s emergency contact once response from emergency services or onsite professional has been obtained. Their contact details are on Beacon under their membership profile. (Click on their membership number from the membership list).You may be able to access their emergency contact details on their phone
- Be aware of location of nearest defibrillator.

Section 9- Data protection

Group Leaders will have access to personal information such as names and addresses of members. It is very important that Group Leaders keep this information confidential and follow the data protection procedures of the u3a. We follow the data protection policy that is available on the u3a national website [u3a - Third Age Trust Privacy Policy](#)

Section 10- Useful links, information and forms

There is a wealth of information on the Beacon admin and the Purbeck u3a websites. Key documents that you may find useful are summarized below.

Document	Where to find it
Membership application form	Purbeck U3A
Meeting attendance sheet	Group Leaders Handbook
Members contact details	U3A Administration (u3abeacon.org.uk)
List of venues	U3A Administration (u3abeacon.org.uk)
U3A Insurance Policy Details	u3a - Home
HSE incident report form	Appendix
Data Protection procedures	u3a - Third Age Trust Privacy Policy

Useful websites

National U3A website and membership area which contains details of subjects and advice sheets.

Mark Fielder
 U3a Group Leaders Co-ordinator
 February 2024 (updated)

Appendices

Attendance sheet 2023-24

Group:

Group Leader:

Venue:

Date:

Topic/Speaker:

Name	Member	Non-member

Accident Report Form

Name of Member & Address:

Name & Address of others involved:

Date of Accident:

Time of Accident:

Location:

Nature of Accident / Circumstances:

Injury Details / Property Damage:

Witnessed by:

Address:

Telephone Number:

Action Taken:

Was any specialised equipment required at the scene? If so give details.

Was medical advice sought afterwards? If so give details.

Signed:

(Group Leader) Dated:

Telephone number:

Expenses Claim Form

Group Name

Postage/Stationery:

Telephone

Photocopies @ 5p each:

Approved Purchases:

Other Items:

TOTAL CLAIMED £.....

Date:

Claimant Name:

Bank Account No:

Sort Code:

Please return to treasurer@purbecku3a.org.uk

Overview of process for setting up a Group

