

Bridgnorth & District u3a

Volunteer Group Leader Handbook



Firstly, thank you for agreeing to set up/take over/continue with a u3a Activity Group.

We hope that you will find it very rewarding.

Initially, however, it might seem a bit daunting, so we have prepared this Handbook to

provide you with advice and support for now and into the future.

Introduction

Each **u3a** is operationally independent working with our umbrella support organisation The Third Age Trust.

The contents of this Handbook is based on experience and good practice gained at **Bridgnorth & District u3a** over the past years.

We use the title '**Group Leader**' for a member who has volunteered to take on the responsibility for an Activity or Interest Group.

Our **Activity Groups Coordinator** (or your *Group Support Link*) will always make themselves available for assistance and advice.

Activity Groups are the life blood of a u3a and each Group will develop its own way of working. However, it is important that your Group follows the Ethos of u3a which is that of shared, participative and self-help learning.



learn,
laugh,
live

The result then will be not only an increase in knowledge, but a supportive and friendly atmosphere which enables everyone to enjoy participating.

The ETHOS of u3a is based on three principles ...

The Third Age Principle ...

- * Membership of a u3a is open to all in their third age.
- * Members promote the values of lifelong learning and the positive attributes of belonging to a u3a.
- * Members should do all they can to ensure that people wanting to join a u3a can do so.

Self-Help Learning Principle ...

- * Members form interest groups covering as wide a range of topics and activities as they desire.
- * Learning is **by the members ... for the members.**
- * No qualifications are sought or offered. Learning is for its own sake, with enjoyment being the prime motive, not qualifications or awards.
- * There is no distinction between the learners and the teachers.
- * They are all u3a members.

The Mutual Aid Principle ...

- * Each u3a is a mutual aid organisation, operationally independent but a member of the Third Age Trust, which requires adherence to the u3a movement.
- * No payments are made to members for services to any u3a.
- * Each u3a is self-funded with membership subscriptions kept as low as possible.
- * Outside financial assistance should only be sought if it does not imperil the integrity of the u3a.

First Steps when forming a u3a Group



- **Development of your Group** ... spend time with the Activity Group Coordinator and agree a way forward.
- **Aims of your Group** ... decide what they are. What are you hoping to learn/achieve/share by offering the Group?
- **National Subject Advisers** ... are there to support with ideas for the development of activities/interest groups. Check if there is one available for your activity. www.u3a.org.uk
- **Neighbouring u3a's** ... check their websites to see if they have a similar activity. Make contact for some first-hand knowledge.
- **Is there Interest in the Activity?** Make some informal soundings and use a sign-up board at the monthly meeting to check.
- **Venues / Transport /Contracts etc** ... work with your Activity Coordinator to clarify any of these or similar issues
- **Financing your Group** ... liaise with the Activity Coordinator/ Treasurer on how monies need to be collected and reported.
- **Risk Assessments** ... check for risks that might occur as a result of the Group's activities. The Activity Coordinator will advise you on risk assessment procedures. Unsure? Just ask!
- **Promoting your Group** ... generate interest by using as many different methods as possible. For example: talk to members in groups that you attend; include in the Chair's monthly email to all members; give a short presentation at the monthly meeting; write an article for the u3a Newsletter. Help is available.
- **First Meeting** ... identify what you want to achieve from this.

**Now it's time to organise a First Meeting
and invite Members along**

The First Meeting ...



Recommended steps to take at an inaugural meeting ...

- Introduce yourself and the purpose of the group as you see it.
- Start an A-Z Register and ask about the skills within the group.
- 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 keep the register or take the subs.
- Agree, if relevant, the level that the group will be aimed at – beginners, improvers, advanced?
- Agree how the group will work – discussion, instruction, presentation etc
- Agree when and where the group will run.
- Identify any accessibility needs that group members may have. (Refer to the u3aPlus website for advice and guidance www.plus.u3a.org.uk)
- Agree the costs for running the group and what members will pay? If it is to be funded by your u3a Committee agree a budget with the Treasurer/Activities Group Coordinator.
- Confirm with your u3a Treasurer how monies will be handled and reported.
- Discuss how group members will communicate with each other bearing in mind data protection concerns.

Agree some Ground Rules with your Members ...

For Example:

- Be punctual
- Listen to each other
- Allow others to speak
- Let Group Leader know if you are unable to attend
- Agree to disagree amicably and be respectful to other group members
- Every contribution matters
- Have patience with and encourage those who are slower to learn



Keep in touch with the u3a Committee ...

Each Activity/Interest Group has an assigned Support Link (usually a Ctee Member) who is there to support you and to ensure that your Group flourishes.

This is particularly important for your first meeting and the following early sessions.

As your Activity/Interest Group develops, changes will happen and issues will arise ... so please keep in touch and let us know ... we are here to help..

... u3a Activity Coordinator

Keeping a Record of your Group

Keeping simple records for your Group is important and can be a useful reference. These should include:

BEACON stores the following information.

Please refer to p10 for more guidance ..

Group Objective & Details	BEACON
Members	BEACON
Schedule of Events	BEACON
Ledger (if needed)	BEACON



Keeping your own Records ...

Templates are available to help you with these.

- Attendance Register A-Z
- Risk Assessment (if applicable)
- Record of Topics covered
- Record of Trips & Visits (including Accounts Summary)
- Useful Contacts
- Resources, Materials and support available
- Local information
- Complaints
- Incident Reports

Record Keeping – Group Attendance

BEACON doesn't provide a function to record attendance ... keeping a simple separate record is needed and is very useful.

Record Keeping – Group Membership

Group Leaders keep **BEACON** up to date by adding/deleting their members as required. *(A regular monthly review is recommended)*

Record Keeping – Trips and Financial Records

Group Leaders are required to keep an up to date record of monies collected (**INs**) and paid out (**OUTs**) as required onto their **BEACON** Ledger.

If a 'free place' is offered for a group booking, this benefit must be shared amongst all participants

Group Leaders that receive/pay out significant sums of money (eg trips) are required to bank cheques/cash asap directly into the **Bridgnorth u3a Activities A/c**. Cash should be kept to a minimum and less than £100.

A Trip **Financial Summary** showing the surplus/deficit together with invoices/receipts and list of members attending to be given to the Treasurer immediately after each trip.

All records should be available for examination by the Treasurer at any time.

Car Sharing—Passenger Contributions

For consistency of practice by all Group Leaders contributions made by passengers are based on realistic running costs of a vehicle, namely

45p per mile. Example:

20 miles return journey (Google Maps) @ 45p/mile = £9.00

£9 divided by 4 (ie driver plus 3 passengers) = £2.25 (paid to driver)

£9 divided by 3 (ie driver plus 2 passengers) = £3.00 (ditto)

£9 divided by 2 (ie driver plus 1 passenger) = £4.50 (ditto)



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 Activity Group Coordinator or Committee Support Link if you are unsure how to resolve the problem or just want someone to explore options with.

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 your Activity 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 Trust. There are Trust Volunteers trained to support with resolving disputes.



Incidents and Accidents

Report all incidents and accidents to the Committee as soon as possible and complete an Incident/Accident Form. It is as well to have an accurate record in case of future problems relating to the incident. Remember that the Third Age Trust provides insurance for group activities. For most groups it necessary to ask members to provide emergency contact details.

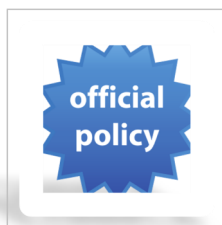
Promoting your Group ...

Sharing information about your Group is encouraged and can be achieved in a number of ways:

- on our Bridgnorth & District **u3a Website**
- via our Facebook Group '**Members Together**'
- in our **Newsletters** and monthly **Chair's email**
- with a **Sign Up Board** at our Monthly Meeting
- giving a short **Presentation** at our Monthly Meetings

Policies and Procedures

Our Activity Group Coordinator will advise on the u3a Insurance arrangements, policies and procedures that you need to be aware of. These will include matters concerning:



Finance
Data Protection & Privacy Policy
Equality & Diversity & Inclusion Policy
Safeguarding Accessibility
Complaints Incident Reporting

Copyright



Bridgnorth u3a holds a Copyright Licence to cover copying materials for educational use within groups.

If you are going to be using copyright material in any form, for example, printed, audio or pictures, please check firstly with the u3a Secretary and also with the advice section of the national website where you will find further details on copyright.

BEACON

BEACON is a 'Management Information System' designed specifically for u3a's and is supported by The Third Age Trust. **BEACON** enables u3as to keep their membership and financial records in a controlled environment.

Group Leaders are asked to familiarise themselves with **BEACON** and to keep the following up to date:



DETAILS	Aim of Group, Contact Venue, Day/Time, Cost
SCHEDULE	Diary of Events to link with u3a Calendar
MEMBERS	Add/Delete as required
LEDGER	Money transactions (INs & OUTs)

EMAIL COMMUNICATION ...

Email is the easiest way to keep in touch with your members and **BEACON** provides a secure way to do this. Group Leaders are asked to use their own Group email template. This gives our members a consistent 'style' especially important if they belong to several groups.

BEACON also has a very useful 'Email Delivery' checking function. Ask the **BEACON** Administrator for a 1-2-1 familiarisation session.

Privacy Statement

All Committee Members, Group Leaders (and/or nominated deputies) are required to use **BEACON** which gives access to members' information, and are therefore required to sign our **Privacy Declaration**. (see last page)

New Members ...

Welcoming joining Members is very important to a healthy u3a ... we need new members to ensure a thriving range of Activity Groups. Group Leaders are asked to support **Welcoming Visitors** to share their personal u3a experiences and encourage new members to get involved.

MONEY MATTERS ...

The following paragraphs outline the procedure that all Activity Groups need to follow so that the **Treasurer**, on behalf of the Trustees, can report our financial activities to our Members at the AGM, the Third Age Trust and The Charity Commission..



The guiding principle is that **all** money paid to the Activity Groups is the legal property of Bridgnorth & District u3a.

The ultimate responsibility for financial transactions carried out by our Activity Groups rests with the **Trustees** of Bridgnorth u3a.

Keeping Financial Records ...

1. Reporting Activity Group financial activity is through **BEACON** which is overseen (on line) by the **Treasurer**.
2. The aim is to collect from members the actual cost of running that activity. *Costs may include room rental, equipment, refreshments etc.* It is not the intention to build up cash reserves. Cash held should be limited to the cost of holding 2 or 3 meetings usually up to a *maximum* of £100.
3. If a surplus builds up then the regular charge to activity group members must be lowered.
It is members' money and if there is a large build up it means they have been paying too much. Their required payment should only reflect the cost of holding the meeting plus any other anticipated occasional costs.
4. Keep a record of all income (INs) and expenditure (OUTs) is kept using **BEACON** and includes:
 - Opening balance of funds held at the start of year (1st April))

- Receipts (INS) from members into the activity group fund
- Payments (OUTs) from funds held by the activity group
- Ongoing surplus (deficit) arising from INs & OUTS
- Closing balance of funds held at the end of financial year

5. On 31st March, the **Treasurer** will include these in the u3a Accounts and Financial Report to the **AGM**.
6. The **Treasurer** may request to see supportive paperwork (costings, receipts etc) at any time during the financial year.
7. National u3a rules do not allow Activity Groups to have their own bank account. If you wish to make payment with a u3a cheque, pay sum due in cash collected to the Treasurer and a cheque will be raised.
8. Wherever possible, avoid using cash, payments should be made by cheque or debit card against an invoice/booking form.
9. If an Activity Group faces an unexpected or exceptional one-off cost, (eg *advance trip deposits*) ask the Treasurer to raise payment from the Deposits Fund held in the u3a Activity A/c.
10. Only the Trustees can enter into formal contracts on behalf of u3a (eg *room hire*) This is done through the **Secretary/ Treasurer** who need to register each contract and check insurance details.
11. Some examples of contracts are agreements to provide services such as room hire, coach hire, booking theatre tickets or using a professional instructor. Once a contract has been agreed and recorded by the **Secretary**, it can roll onwards. ie booking same coach company for future events does not involve registering a new contract.
12. **Under no circumstances** should Group Leaders pay members' money into (or out of) their private bank accounts.

OTHER HELP & SUPPORT ...



Subject Advisers: Trust volunteers with specialist knowledge in a wide range of topics. Contact details are available on the national website and in 'u3a matters'.

External organisations: Museums, libraries, schools, universities.

u3a Publications: Check the national website for the latest publications.

Networks, Regions, neighbouring u3as: allow you to draw on experience from within the movement

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

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

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

OTHER LEARNING OPPORTUNITIES ...

Shared Learning Projects and Shared Learning Project Coordinators—contact details from the national website.

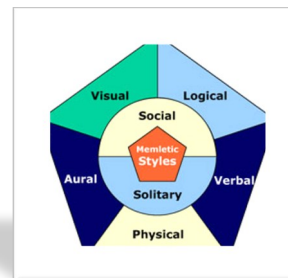
National and Regional Summer Schools

Events facilitated by National Office

National, Regional and Network Workshops and Study Days.

Outreach departments of universities.

A Guide to Participative Learning and Learning Styles ...



'Tell me and I forget.

Teach me and I remember.

Involve me and I learn'

Benjamin Franklin

'Every accomplishment starts

with the decision to try' Anon

The value of the u3a style of learning is that everyone can contribute and by doing so will gain a feeling of self-worth and integration. We all learn in different ways. Variation in content, method and style can make the learning experience more vibrant and appealing. Many of us will have particular skills but most of us will use a combination of the following:

Visual:

using pictures, diagrams, images and spatial understanding.

Verbal:

using words – both spoken and written.

Auditory:

using sounds, rhythm, music, spoken presentations.

Physical/Kinaesthetic:

using hands, body, senses and acting things out.

Logical/Mathematical:

using logic, systems, sequences, data, statistics.

Social:

learning as part of a group, sharing experiences and explaining your understanding to others.

Solitary:

studying on your own.

Some options you may consider using ...

A visiting speaker: A one-off visiting paid speaker, non-paid tutor or someone from another interest group or u3a.

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

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

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

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

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

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

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

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

Shared Learning Projects: These are opportunities to work on short term projects with other u3a's or outside organisations. They usually involve research and have a definite outcome.

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

Online learning: YouTube 'How to' videos, TED talks, Future Learn.

u3a brings Members together

to continue to

'Learn, Laugh, Live'

The Ethos of u3a is that members work together and offer their services freely to further the aims of the Third Age Trust and its associated Activity Groups.

Consequently no member of u3a can be rewarded in cash or in kind for the provision of services/time.

Out of pocket expenses can be claimed or taken in cash from the Activity Group fund provided that it is properly recorded in the Activity Group Accounts (BEACON) or by an Expenses Claim to the Treasurer.

* * * * *

A Quick Checklist for New Group Leaders

Read our Policies? (*easily accessible on our Website*)

Data Protection		o
Privacy		o
Equality and Diversity		o
Agreed object, date and time of activity on BEACON?	(p 4)	o
Agreed costs with venue and group members?	(p 4)	o
Entered members details onto BEACON?	(p10)	o
Set up an accounting procedure with Treasurer?	(p 11)	o
Carried out a Risk Assessment?	(p 3)	o
Set up a Record Keeping system?	(p 7)	o
Obtained an Accident/incident form?	(p 8)	o
Checked any Copyright issues?	(p 9)	o
Agreed and set out group rules with members?	(p 5)	o
Kept in touch with Activity Groups Coordinator?	(p 5)	o

ADDENDUM 2022 ...

EMERGENCY CONTACT NUMBERS ...

During Activities, Group Leaders must have available a list of Attendees including their 'Emergency Contact' details. (downloadable from [BEACON](#))

Groups Leaders MUST notify all attendees (especially Drivers) of a central Emergency mobile number (usually GL's mobile).

PHOTOCOPYING Expenses

Where personal printers are used for an Activity/Interest Group

The following is suggested as a guideline for small print runs:

B&White copies 15p per A4 sheet

Full Colour copies 30p per A4 sheet

Larger quantities ... please contact Committee for advice—thank you.

Edition 2025-26

Contributions to improve are welcomed



Useful Contacts:

If you have any concerns please
make contact with any of the following ...

Chair ... Elaine de Graaff (2025-)

Secretary ... Linda Barton (2024-)

Treasurer ... Sue Hannah (2025-)

Activity Groups Coordinator ... Heather Yarwood (2024-)

Membership Secretary ... Janet Hardy (2023-)

Beacon /IT Support Admin ... John Barton (2025-)

Useful Websites ...

www.bridgnorthanddistrictu3a.org.uk

www.u3a.org.uk

updated April'25/CW

PRIVACY DECLARATION



Name:

Activity Group:

I have read (see u3a Website p2) Bridgnorth & District u3a **Data Protection Policy, Equality & Diversity Policy, and Privacy Policy.**

I understand that as an Activity Group Leader and/or Committee Member that I am obliged to comply with these Policies.

I understand that I must also:

- ensure that my computer is protected by a firewall (eg Windows Defender Firewall).
- use a strong password (a mix of upper and lowercase letters, numbers and symbols) to access my PC or iPad/Tablet/ Smartphone.
- not share my password with anyone else.
- ensure that any data that I download from BEACON, or any records of members' personal information that I keep, must be kept securely, and that only I can have access to them.
- securely store any paper copies that contain personal information.
- ensure that all information I hold is kept up-to-date and securely destroyed (paper copies shredded) when it is no longer relevant.

I have read the above and acknowledge that it is a very brief summary of my responsibilities as a u3a Activity Group Leader and/or Committee Member.

Signed: Date: