

# Bridgnorth & District u3a

## Volunteer Group Leader Handbook



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

**We hope 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 under our umbrella support organisation The Third Age Trust.

The contents of this Handbook is based on good practice to date here in **Bridgnorth & District u3a** .

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 a *Committee Member*) 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 u3a ethos of shared, participative and self-help learning where ... '**the teachers learn**' and '**the learners teach**'.

learn,  
laugh,  
live

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

## 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.

## Some 'First Steps' when forming a u3a Group ...

- \* Agree the development of your group with the **Activity Group Coordinator**.
- \* Liaise with the Activity Coordinator/Treasurer regarding the financing of the group and how this needs to be reported.
- \* Consider what interest there might be in the subject ... through some informal soundings and a sign-up board.
- \* Consider what the Aims of your Group are – what are you hoping to learn/achieve/share by offering the Group?
- \* Is there an existing National Subject Adviser who can support with ideas for the development of your group? [www.u3a.org.uk](http://www.u3a.org.uk)
- \* An alternative to subject advisors might be to contact a neighbouring u3a to see if they have a similar subject group and then talk to their group leader to get some first-hand knowledge. It may be that you could sit in on a group meeting.
- \* Generate interest by promoting your group using as many different methods as possible. This could include publicity in the form of a leaflet, promotion via existing groups, via our u3a Newsletter, talking to members in groups that you attend, sending an email to all members. The more methods you use, the more successful you are likely to be.
- \* Would your activities benefit from having a risk assessment completed for the group? You should consider whether there are any risks that might occur as a result of the Group's activities and, if you identify any, talk to the Activity Group Coordinator who will advise you on risk assessment procedures. If you're unsure or want further advice just ask.
- \* Identify what you want to achieve from your first meeting.

**Now it's time to organise a first meeting and invite members!**



## The First Meeting ...

### Recommended steps to take at the first meeting ...

- Introduce yourself and the purpose of the group as you see it.
- 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.
- 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](http://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 them.
- 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 ...

### 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 ...

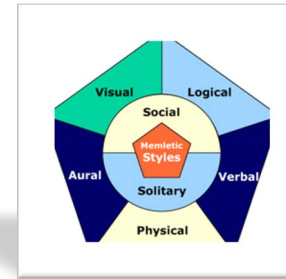
*Your u3a Committee wants to give support and work with you to ensure that your Group flourishes.*

*Feedback what was agreed at the first meeting to the Group Coordinator for finalising arrangements.*

*As your Group develops, changes will happen and issues will arise ... so please keep in touch and let us know ... someone will be available to help.*

**... u3a Trustees (Committee)**

## 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 U3As 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](#): MOOCS (Massive Open Online Courses), YouTube 'How to' videos, TED talks, Future Learn.

## 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 Third Age 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

[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.

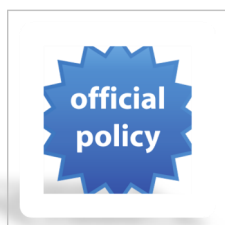
## Sharing Information ...

It can be good to share information about your Group which can be done 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 and/or Treasurer 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 and Inclusion Policy

Safeguarding

Accessibility

Complaints

Incident Reporting

## Copyright



The Trust holds a licence to copy some 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.

## 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 your Activity Group Coordinator or Committee 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 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.

## Accidents and Incidents



Report all accidents and incidents 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 hold or provide emergency contact details.

## Keeping a Record of your Group

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

### BEACON can store some of this information for you ...

Details & Group's Aims	BEACON
Members	BEACON
Schedule of Events	BEACON
Accounts Ledger (if needed)	BEACON



Attendance Register  
Record of Topics covered  
Record of Trips & Visits  
Useful Contacts  
Resources, Materials and support available  
Local information  
Complaints  
Incident reporting

## 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:



<b>DETAILS</b>	Aim of Group, Contact Venue, Day/Time, Cost
<b>SCHEDULE</b>	Diary of Events to link with u3a Calendar
<b>MEMBERS</b>	Add/Delete as required
<b>LEDGER</b>	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 the supplied template, with personalisation, when sending an email. 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.



## Record Keeping – Group Membership and Attendance

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

Group Leaders are required to keep an up to date record of members attending their group, adding/deleting as required on BEACON.

*(A monthly review is recommended)*

**Please note:** Bridgnorth & District u3a only allows current (fully paid up) members to take part in any of our Activities.

## 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 BEACON.

Group Leaders are expected to pay for their own personal costs, *eg tickets, entry fees and coach travel*. **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 from members for activities (eg trips), are required to bank cheques/cash asap directly into the **Bridgnorth U3A Activities A/c**. Cash kept at home should be kept to a minimum and certainly less than £100 at any one time.

For Trips, a Financial Summary, showing the surplus/deficit for each trip/visit, together with receipts and list of members attending, should be handed to the Treasurer, as soon as possible after the trip.

These records are then available for the Accounts Examiner at the end of the financial year. All records should be available for examination by the Treasurer at any time.

**NB Car Sharing** Please see Addendum 2022 on page 19

## 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 accurately report our financial activities to our Members, the Third Age Trust and the Charity Commission at the AGM.



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.

## Record Keeping – Financial Transactions

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 up to a *maximum* of £100.
3. If money begins to build up close to the agreed limits, the regular charge to activity group members must be lowered. It is member's 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. A record of all income (INs) and expenditure (OUTs) kept using BEACON includes:
  - Opening balance of funds held at the start of year (01/04)

- Receipts (INS) from members into the activity group fund
  - Payments (OUTs) from funds held by the activity group
  - Ongoing surplus (deficit) arising from receipts minus payments
  - Closing balance of funds held at the end of financial year (31/03)
5. On 31st March, the **Treasurer** will include these in the u3a Accounts and 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 to the Treasurer and a cheque will be raised.
  8. Wherever possible, payments out, should be made by cheque or u3a debit card against an invoice/booking form.
  9. If an Activity Group faces an unexpected or exceptional one-off cost, (*eg advance deposits for trips*) ask the Treasurer to endorse payment from the Reserves 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. eg 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 their private bank accounts.

## u3a Members come together 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 <a href="#">BEACON?</a>	(p 4) o
Agreed costs with venue and group members?	(p 4) o
Entered members details onto <a href="#">BEACON?</a>	(p12) o
Set up an accounting procedure with Treasurer?	(p13) o
Carried out a Risk Assessment?	(p 3) o
Set up a Record Keeping system?	(p11) o
Obtained an Accident/incident form?	(p11) o
Checked any Copyright issues?	(p10) o
Agreed and set out group rules with members?	(p 5) o
Kept in touch with Activity Groups Coordinator?	(p 5) o



## ADDENDUM 2022 ... SHARED PRIVATE CAR TRANSPORT

### Transport—Passenger Contributions (Minute 6.4 2022-08)

The Trustees agreed, for consistency of practice by all Group Leaders, that contributions made by passengers should be based on realistic running costs of a vehicle, namely **45p/mile**.

Group Leader checks return mileage (Google Maps) from central Bridgnorth. Group Leader to advise members of travel cost prior to trip. Eg ...

20 miles return journey @ 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)

### Alternatively ...

Group Leaders can collect an averaged cost from ALL passengers and re-distributed to ALL drivers.

### ATTENDEES & EMERGENCY CONTACTS ...

Group Leaders to have available a list of attendees including 'Emergency Contact' details. (downloadable from BEACON)

Groups Leaders to notify all attendees (especially Drivers) of a central emergency telephone number (usually GLs mobile).

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### PHOTOCOPYING Expenses

Where personal printers are used for an Activity Group ....

The following is suggested as a guideline:

B&White copies 15p per A4 sheet

Full Colour copies 30p per A4 sheet

Fifth Edition (2023-06)

Contributions to improve are welcomed



### Useful Contacts:

If you have any concerns please get in touch with any of the following ...

#### Chair ... Chris Wright (2023-24)

[chair@bridgnorthanddistrictu3a.org.uk](mailto:chair@bridgnorthanddistrictu3a.org.uk)

#### Secretary ... tbc

[secretary@bridgnorthanddistrictu3a.org.uk](mailto:secretary@bridgnorthanddistrictu3a.org.uk)

#### Treasurer ... Pamela Oakley (2021-2024)

[treasurer@bridgnorthanddistrictu3a.org.uk](mailto:treasurer@bridgnorthanddistrictu3a.org.uk)

#### Activity Groups Coordinator ... Susan Powell

[activities@bridgnorthanddistrictu3a.org.uk](mailto:activities@bridgnorthanddistrictu3a.org.uk)

#### Membership ... Janet Hardy

[membership@bridgnorthanddistrictu3a.org.uk](mailto:membership@bridgnorthanddistrictu3a.org.uk)

#### Beacon Administrator ... Chris Wright

[beacon@bridgnorthanddistrictu3a.org.uk](mailto:beacon@bridgnorthanddistrictu3a.org.uk)

#### Useful Websites ...

[www.bridgnorthanddistrictu3a.org.uk](http://www.bridgnorthanddistrictu3a.org.uk)

[www.u3a.org.uk](http://www.u3a.org.uk)

updated AGM April 2023

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# PRIVACY DECLARATION



Name: .....

Activity Group: .....

I have read (see u3a Website) 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 (or nominated deputy) and/or Committee Member.

Signed: ..... Date: .....