



## Ilkeston u3a

# Interest Group Leaders' Handbook

**The purpose of this handbook is to provide advice and support to Interest Group Leaders (GLs) and any member wishing to lead a new group. Interest Groups are the life blood of u3a, so, on behalf of the movement – Thank You!**

Each group will develop its own structure. However, it is important that your group follows the u3a ethos of shared, participative and self-help learning. 'The teachers learn, and the learners teach.' The result will then be not only an increase in knowledge, but a supportive and friendly atmosphere which enables everyone to participate.

### u3a principles

The u3a ethos is based on three principles:

#### The Third Age Principle:

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

#### The 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.



## What makes a successful u3a group?

### You do not have to be an expert in the chosen subject to lead a group

- Enthusiasm for the subject, and a willingness to encourage others to join you in exploring it, is what is required.

### All groups are run by our members, for our members

- We are all teachers, and all learners, and we work together to learn together.

### You don't have to do everything yourself

- Roles within a group can be shared, taken in turns, or all done by one person.

### The main task of a group leader is therefore

- to establish and maintain the group
- to organise the group's schedule of meetings
- to be a source of information for potential members
- to be a contact point to and from Ilkeston u3a

## Setting up a new group is very straightforward:

### Choose your topic and duration:

Consider what the aims of the group are – what are you hoping to learn/achieve/share by offering the group? Write a short description of what the group will do. This can be very general (e.g. Book Group: reading and discussing selected fiction) or more specific (e.g. Introduction to Economics: a programme of 10 sessions covering topics *x*, *y* and *z*, and using reference book *ABC*)

You may also wish to consider how long you want to run this group. Do you want to do it for one year and encourage others to take over from you, or 5 years? Maybe it doesn't matter, but whatever you decide it is worth considering.

### Contact the Interest Groups Coordinator

Agree the development of your group with the Groups Coordinator who will be able to offer advice and support throughout including liaison with the Treasurer regarding the financing of the group and how this needs to be reported, where relevant, and National Subject Advisers.



### Choose your time:

Groups normally meet on a regular day for about 2 hours. Some groups meet monthly, others fortnightly or even weekly. Most groups meet in the daytime on weekdays but there is no reason why you cannot choose to run your group evenings or weekends.

### Choose your place:

Home, Venue, or Zoom – it’s up to you. Some groups meet in members’ homes. Some make use of an accessible public venue such as a Public House meeting room, Community Centre, or local Library. Some groups meet online using Zoom.

### Promote your group

Generate interest by promoting your group using as many different methods as possible such as a poster, group interest sheet, announcements at open meetings, the Ilkeston u3a newsletter, talking to members in groups that you attend or the Ilkeston u3a website.

## The first meeting

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

- Involve the Groups Coordinator, who can offer support.
- 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 access or other needs that group members may have.
- Agree the costs for running the group and what members will pay.
- Discuss how group members will communicate with each other bearing in mind data protection procedures.
- Agree some ground rules, for example:

Be punctual	Listen to each other
Allow others to speak, every contribution matters	Let someone know if you are unable to come
Agree to disagree amicably and be respectful to other group members	Have patience with and encourage those who are slower to learn

Feedback what was agreed at the first meeting to your Groups Coordinator to finalise arrangements.



## Running the Group

### 1. Registration and Attendance

- a) A register should be kept and attendance at each meeting recorded. This is primarily for insurance and fire safety purposes or financial records, and secondly for Ilkeston u3a to monitor how u3a members use our organisation (including clusters/reciprocal members).
- b) Registers (or a list of group members) are submitted to the Groups Coordinator at least annually, about March time, for analysis of members' activities.
- c) Group Leaders should encourage members to record their emergency contact details on the back of their membership cards and bring them to each meeting.
- d) Group Leaders should ensure that all group members are fully paid-up members of Ilkeston u3a as non-members are not covered by the Public Liability Insurance.
- e) Visitors may attend once as potential new Ilkeston u3a members, at the Group Leader's discretion. Potential members are covered by the insurance.
- f) Paid up members of Long Eaton, Beeston, Stapleford or Derby u3as may attend up to 3 Ilkeston u3a interest groups on a regular basis, at the Group Leader's discretion. Such members can attend under our local cluster / reciprocal agreements.
- g) Cluster / Reciprocal members attending a group must complete a Cluster or Reciprocal Membership Form for each group they attend. This form should be forwarded to the Membership Secretary. Checks should be made to verify they are paid up members of their home u3a.
- h) Once the group is running, members should apologise in advance for absence.
- i) In the event that any member does not attend a meeting of the group on 3 consecutive occasions without apology, the Group Leader is within their rights to inform the member they may be removed from the register unless they respond to the Group Leader within a given time that they wish to remain in the group. This is more likely to be an issue for groups with a waiting list, and less so for groups with vacancies. Group Leaders are at liberty to use their discretion how and when, or even if, they approach members who are not attending or giving apologies.
- j) If a group has a waiting list, the Group Leader may decide to approach members who attend infrequently to ascertain if they wish to remain in the group.

### 2. Members' Safety and Insurance

#### These measures are intended to protect Group Leaders, Members, and u3a Committee

- a) An initial Risk Assessment must be completed for a new group and submitted to the Business Secretary. This is a requirement by the insurers. For Group Leaders who have not done a Risk Assessment before this may seem a daunting task, but it is

not difficult and full support is offered by the Groups Coordinator, or a member of the Committee. Forms are available on the website often with guidelines and prompts to help completion.

- b) Risk Assessments should be reviewed at least annually, and a 'Day of Use Checklist' is a useful tool to ensure the continued smooth running of the group.
- c) A new Risk Assessment needs to be completed if there is a change of venue, or if the group makes a visit somewhere. It may be worth asking the venue if they have a generic risk assessment for users.
- d) In the event of an accident or incident during a group activity, an incident report form must be completed as soon as possible while things are still fresh in people's minds, and a copy forwarded to the Business Secretary who will retain it on committee file for 3 years in case of a future claim for damages. The Committee make the decision as to whether the insurers should be informed about each incident using Third Age Trust guidance where necessary.
- e) Please note that no-one should admit liability or fault on the part of yourself or other members (particularly in the event of member versus member claims), even where you believe that this is the case. The insurers make this determination and would have the right to refuse cover if liability or fault had been admitted.

### 3. Group Finances

- a) Groups are expected to be self-financing, and costs should be kept to a minimum and agreed between group members. Costs may include such things as the hiring of a venue, fees for speakers or tutors, photocopying or craft materials. Some groups choose to 'save up' for something, a speaker for instance, by collecting additional small amounts each meeting from its members. Members cannot receive payment for tutoring or services.
- b) Sometimes a new group will need a specific item or a supply of resources to get them going. A start-up grant can be made available, up to a maximum of £30, subject to prior Committee approval. Discuss this with the Groups Coordinator.
- c) Monetary contributions from group members should be recorded, for instance on the group register. Periodically it is good practise that the Group Leader accounts to the group for the way the money has been spent, verbally, or with a simple financial statement.
- d) The Group Leader is responsible for organising any payments and keeping relevant records. This may be delegated to a group member.
- e) It should be noted that all money received in groups belongs to Ilkeston u3a, not the members. No money should be distributed or given back to members other than by way of group expenditure which should be recorded and receipts obtained.
- f) If a Group Leader organises a trip and takes in money specifically for this purpose no refunds may be given unless the outing or activity has to be cancelled. In this



instance refunds should be calculated **after** the event, to allow for any known or unforeseen costs that have been incurred. If a member cannot attend the event any money paid will be forfeited unless the place can be taken by someone else and there is no detriment to other members on the same activity.

- g) If a group is held in a member's home it is recommended that the members contribute towards refreshments. Such monies should be given directly to the host and does not need to be accounted for.
- h) The Group Leader should arrange the hiring of a venue and inform the group of the charge. When the provider of the venue is paid a receipt must be obtained.
- g) Cash held by groups in members' homes is insured up to £300 but you are not advised to keep this amount in the long term. It is recommended, at the discretion of the Group Leader, to give amounts over £60 or so to the Treasurer for banking.
- h) Annually, the Treasurer requires a simple financial statement from the group for the preceding 12 months for inclusion in Ilkeston u3a year-end accounts. A completed Financial Statement made up to 31<sup>st</sup> December, with all associated receipts must be sent to the Treasurer as soon as possible after 31<sup>st</sup> December. The electronic version of the Financial Statement form is easy to use and automatically calculates income and expenditure balances. It is recommended to use this on a regular basis to make end of year reporting quick and easy.
- i) If a group ceases to function, any unspent funds should be given to the Treasurer for banking and will be used for the general good of all members.

#### 4. Equipment

All Ilkeston u3a equipment is available for the use of all groups or the Committee. The Treasurer holds the equipment list (aka Asset Register), which is reviewed annually. The equipment is held in various locations. Contact the Treasurer if you wish to use anything or to find out where it is.

Portable Appliance Testing (PAT) is not a legal requirement therefore Ilkeston u3a does not undertake this. However, electrical items do need to be maintained in good order to prevent danger. Report anything untoward to the Committee.

If a group needs any further specific items, this should be discussed with the Groups Coordinator who will then direct the request to the Committee. It is useful to provide quotes or information about what is requested for the Committee to make provision.

#### 5. Publicity

It is anticipated that Group Leaders will publicise their groups regularly by using the notice boards at the monthly meeting and sending articles to the newsletter editor and the website editor. Group Leaders should let the Groups Coordinator know of any changes of the time or venue of their meeting as soon as possible.



## 6. Copyright and Licences

Copyright is an area of law which protects creativity. It is automatically applied and only the copyright holder has unlimited rights to use their work. Copyright infringement is a serious matter and any breach is **not** covered by u3a insurance.

A CLA (Copyright Licensing Agency) licence is purchased from the Trust by Ilkeston u3a for £65 a year which allows use of some materials within limits for educational use within groups. The Trust also provides an umbrella PPL (Phonographic Performance Limited) PRS (Performing Rights Society) licence to cover the playing of music and an MPLC (Motion Picture Licensing Company) licence to cover the showing of films.

These are included in the membership fee that Ilkeston u3a pay to the Trust. There are limitations to each of these licences and if you are going to be using copyright material in any form, for example, printed, audio or pictures please check the full Copyright & Licensing Policy on our website or the “Support for u3as” section of the national u3a website for further details. [www.u3a.org.uk](http://www.u3a.org.uk)

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## 7. Data Protection

- a) Group Leaders should keep members personal data secure, by taking sensible precautions and following the full guidelines in Ilkeston u3a Data Protection Policy, on the website.
- b) To protect personal data Group Leaders should use the ‘blind copy’ option (bcc) when sending an email out to the members of their group and keep contact lists updated.
- c) Photographs of group members are personal data. Photographs of individuals should not be published without the explicit consent of that individual. Ilkeston u3a’s Business Secretary and Chair keep an up-to-date list of members who have given consent to use their photo. Where group photographs are being taken and may be circulated members should be asked to step out of shot if they do not wish to be in the photograph.
- d) Nobody should store personal data without a need to have it, and to do so is a breach of Data Protection law. So if you cease to be a Group Leader, or have no further need to retain a member’s details, for instance if they leave the group, the personal data held must be returned to the Committee, or deleted or destroyed.



- e) Further guidance on protecting personal data and Ilkeston u3a procedures can be found in Ilkeston u3a Data Protection Policy published on the website.

## 8. Problem solving

Sometimes issues can arise within a group that disrupt its smooth running and spoil the enjoyment for everyone. Don't leave a problem too long before trying to resolve it. Talk to your Groups 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 u3a Office if you want to talk something through or check something out.

## 9. 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 Groups Coordinator or a member of your Committee. If a situation does not resolve and becomes acrimonious your Committee can move to the disciplinary procedure. The u3a office can be contacted for advice if necessary.

### Other issues you may encounter:

- If a member's behaviour is regularly disturbing other members of the group consult the Groups Coordinator for help. If you feel comfortable dealing with the issue in the first instance, then you can do so. Alternatively, you can seek additional support from your Groups Coordinator.
- If there is a very serious problem in a session, it may be necessary to ask the member/s to leave for the remainder of the session. If this occurs please contact the Groups Coordinator as soon as possible after the end of the session.
- If a member who is not able to cope independently comes to a meeting without a 'carer', inform the Groups Coordinator as soon as possible to discuss how best to resolve this situation.

## 10. Complaints

Complaints should be directed to the Committee, or if attempts at early or informal resolution have been unsuccessful. Complaints may come from members about an issue that has arisen or from an external organisation or individual. Depending on the nature and source of the complaint, the Committee will make a decision as to how best to approach reaching a resolution.





If the complaint proves to be related to a breach or suspected breach of the Members Code of Conduct by a member or trustee, the Committee will invoke a disciplinary procedure.

## Related documentation

The Committee are currently compiling a set of useful forms and documentation in a *Forms Pack* to be supplied separately. All forms will be available electronically from the Groups Coordinator or may be uploaded to the website

u3a	Group Leaders' Handbook		
Version	Description of changes	Date	Review Date
3	Document created from two previous issues and reviewed against TAT template.	November 2023	November 2024
3a	Amendments and additions following consultation with Group Leaders	December 2023	November 2024

