

Details of Committee members and Group Leaders are now kept on the website

- 1. 'THE 10 KEY POINTS'** **Page 2**
- 2.**
- 3. Required Forms**
 - Class register (web or electronic)** **Page 3**
 - Group Members Details (web or electronic)** **Page 4**
 - Expenses – Protocol & Claim Form (web or electronic)** **Pages 5/6**
 - Group meeting Programme (web or electronic)** **Page 7**
 - Accident Report Form (web or electronic)** **Page 8**
 -
 -
 -
 -
 -
 - 3.Equipment Loan and Venue Hire** **Pages 9-12**
- 4. Communications: Newsletter, Broadcasts, Website and Email** **Pages 13/14**
- 5. Health and Safety /Risk Assessment** **Page 15**
- 6. Insurance Details** **Pages 16/17**
- 7. National U3A Website and Membership Area / Subject Advisers** **Page 18**
- 8. National U3A Advice Sheets**
 - No 1 - Accessibility for Disabled members** **Page 19**
 - No 1a - Helping U3A members who are hard of hearing** **Pages 20/21**
 - No 6 - Sorting out problems/Grievances** **Page 22**
 - No 8 - Social Events and Travel** **Pages 23/4**
 - No 10 - Licences including Copyright** **Page 25**
 - No 12 - Waiting Lists** **Page 26**
 - No 14 - For Group Leaders/Coordinators/Facilitators** **Pages 27/8**
- 10. Equal Opportunities Policy Declaration** **Page 29**
- 11. Local halls ; contact details for booking , and latest charges**
- 12. PURBECK U3A GROUP LIST is kept on website**

Introduction

Purbeck U3A offers many and diverse interest groups. Some have just 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 are not aware of the resources available to you to help with the running of your group. Also some of you are not aware of some of the minor but necessary duties which are your responsibility as group leader.

This handbook, hopefully, provides the answers to all – or most – of your questions and will help with the smooth running of your group.

- This handbook covers all aspects of local U3A information and requirements.
- There is further information from the National U3A database – an invaluable and often overlooked resource and it is well worth spending some time on line exploring this.

As well as all the practical elements of this handbook it contains an important guide on how to develop and plan for the future of your group. The '10 Points' summarise key tips for the effective running of your group. We encourage you to read this manual and should you have any questions or need help, do not hesitate to contact the chair, the Groups Coordinator, or any other committee member.

Your role as a Group Leader is key to the success of Purbeck U3A and we hope you will enjoy the experience. Remember, the committee and other Group Leaders are here to help you in any way they can.

SECTION 1. 'THE 10 KEY POINTS' – useful tips for Group Leaders

This manual is – hopefully – a guide to help you run your U3A group. It provides the nuts and bolts of procedures, paperwork, support, etc. The following 10 Points should give you a starting point and help you think through the structure and organisation. These points are not written in stone and all groups are different but they highlight some of the key issues.

1. Take advantage of the supports, resources and templates available to group leaders from Purbeck U3A and the Third Age Trust. Familiarise yourself with the Purbeck U3A Group Leaders' Handbook, (this document) which brings together a range of practical tips, pro-formas and other guidance for group leaders.
2. Take the opportunities provided through Purbeck U3A to meet and network with other group leaders to share experiences, problem solve and spread good practice. Attend the regular Group Leaders meetings or send a deputy from within your group in your absence.
3. Help members to be clear about the purpose of the group, the role of the group leader and what members can expect from and contribute to the group.
4. Ensure that you can focus on group leadership by identifying and delegating administrative responsibilities. Compile a list of members who will volunteer to help with this.
5. Draw on the strengths in your group. Encourage active participation and invite group members to present or share their own ideas and interests and use their skills, and to deputise as leader when necessary .
6. Share responsibilities among group members from the outset and encourage greater involvement, such as becoming a group leader or standing for the Committee . Think about a succession plan for leadership of the group.
7. Help to dispel the idea that being a group leader needs to be daunting. Remind members that group leadership can be ended for many reasons and can be organised as a shared responsibility with other group members
8. Clarify how the group will operate when the leader is absent. A member of the group may volunteer to lead or someone from another group could be approached to provide cover. A clear list of tasks should be provided
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 with a view to developing an additional group.

SECTION 2 - General Information

ALWAYS REMEMBER THAT SHARED LEARNING MEANS THAT, AS A U3A GROUP LEADER, YOU ARE NOT ALONE.

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 regular meetings for Group Leaders.

The following advice is for those who nurture groups.

It is intended as a checklist for all, whether starting a new group, hoping to enliven a group that seems to need it, or for working with a group that continues to thrive.

U3As are based on the belief that shared learning is both effective and suitable for those in the third stage of life, whose days are no longer given to full time employment and who wish to continue learning. A U3A provides the opportunity to continue learning, and to enhance quality of life, by the sharing of knowledge and experience.

There is no common curriculum and no syllabus to follow. Each group makes its own provision, according to need and desire. Life in a U3A is therefore varied. It may include formal occasions with lectures or speakers or may provide social occasions which have grown out of the fellowship of people meeting to pursue a common goal, but the heart of the organisation beats in the groups who meet to pursue specific interests. It is the responsibility of those who lead these groups to provide the best possible environment for learning to take place.

A. WHAT'S IN A NAME?

Are you a tutor? Are you a facilitator? Are you a coordinator? Are you a convenor? Are you a leader? These are the most often used titles in U3A and the choice is only important in so far as they tend to indicate a function. A **'tutor'** is usually expected to teach, a **'facilitator'** to provide, a **'convenor'** may simply call the group together, a **'coordinator'** has expectations that the group members will take an active role and the group members expect a **'leader'** to take the initiative. Whatever you decide to call yourself, the important thing is that you and the group arrive at a clear and shared understanding of how you intend to be and what you intend to do, because the chances are that you will be all of these some of the time. (Leader is a broad term and can cover all the other terms and more)

B. STARTING A NEW GROUP

The practicalities of starting a new group, such as how it is advertised, how venues are booked, how it is funded etc are matters for individual U3As. This section is written in response to other questions that are often asked, and contains recommendations born out of experience.

Groups start in a number of ways. Sometimes the group leader emerges first, and the group forms around the enthusiasm and/or the expertise of an individual. Sometimes the group starts with little more than a desire to learn about something and there is no obvious leader at the beginning. Sometimes the Group Coordinator, or the person on the committee responsible for groups, has been asked to form a group and convenes a meeting with no intention, themselves, of even being a group member, let alone becoming the

leader. It does not matter which way a group starts, but what does matter, is that it is agreed what the group is going to do and what members of the group can realistically expect of each other.

1. Prepare for the first meeting.

- It is useful to have a handout for the first meeting in the form of a check-list. This focuses the group and encourages shared responsibility.
- As the group leader you should decide how much time/expertise you will realistically be able to offer and what you will expect of the group members. Do not over-commit yourself because you may get tired and the group will suffer.
- Find out what help is available nationally and locally. Talk to your Group Coordinator. There may be study days planned and there may be opportunities to meet with others to share experience.
 1. Contact the National Subject Coordinator and register as an emergent group with the subject network. It can be helpful to have a selection of newsletters at the meeting.
 2. Contact your local association of U3As. There may be a policy and plan to support new group leaders which would be of benefit.
 3. Contact the National Resource Centre and register as a borrower
 4. Register with 'Sources'; Mark I don't know what that is; do you?

2. At the first meeting

You will need to agree your purpose, find out the skills and resources at your disposal, and then decide on methods. Agreement needs to be reached in the area of content (what the group is going to do), the level at which the group will work (beginners, improvers, advanced), the process (practical, theoretical), and the delivery (discussion, instruction, presentation, participation etc).

- **Find out and make clear what the members expect of the group**

A successful group will be clear about and share expectations. If there is a wide variety of expectation, then consider forming more than one group. If this is not feasible, then plan a programme in such a way that as many approaches as possible are included. It is a useful exercise at the first meeting to get agreement to a short description of what the group hopes to do and how they hope to do it. This will subsequently form a statement of intent which will help to keep the group on track and will inform potential new members. This is particularly important when there is more than one group offered in the same subject area.
- **Discover the expertise in the group**

In order to share learning it is important to find out what knowledge and experience exists in the group. Once this is known, it must then be decided how the group is going to use such expertise as there is. It must also decide how it is going to gain expertise if little or none is present. You may be fortunate enough to have many group members able and willing to share their expertise, or you may start with just one enthusiast. You may also start with little or no obvious expertise. Shared learning does not mean that a group cannot seek to extend its learning base by inviting others to join them either permanently or for specific purposes. The ethos of U3A is that its members share

their knowledge and experience freely, but there may be times when a paid external speaker or even a paid external tutor is desired by the group. This has both financial and legal implications. (See insurance policy page for example)

- **Decide the method & approach**

Many methods are used in U3A including –

1. lectures which are dependent on someone with knowledge and lecturing skills
2. taught sessions with participation, which are dependent on someone with knowledge and teaching skills
3. shared presentations, which are dependent on the commitment of the members
4. discussions, which are dependent on facilitators
5. skills teaching, which is dependent on demonstrators
6. fieldwork or trips, which are dependent on guides, and combinations of these.

All methods are legitimate, as part of the shared learning experience, providing they are suitable for the topic, use the skills available, and are accepted by the group. It is not necessary to choose one method for all time, as different formats will be suitable for different purposes.

- **Decide practicalities**

Try to approach this with a fresh eye bearing in mind what would be best for your subject and your members, even if this is different from the norm in your U3A.

Checklist:

Time

Length of meeting, time of day, frequency of meetings. Be flexible at this stage and look at different models – regular meetings over the whole year? Regular meetings in term time? Meetings arranged as and when? Short courses? Residential?

Type of venue

You will need to take into account the size of the group and what the group needs e.g. type of chairs, tables, screens, equipment. Think also about the subject matter and whether it needs a neutral rather than a domestic setting, a formal or an informal ambience.

Size of group

The manageable size of the group will be dependent on subject, treatment and accommodation. The ethos of U3A is that it seeks to meet the needs of the membership and waiting lists should be avoided wherever possible. It may be necessary to have more than one group.

C. SUSTAINING A GROUP

U3A interest groups are self motivating, on-going groups which can be difficult to maintain, as there is no external impetus, no external regulator, and no external mandate. They come into being, continue, and cease as directed by members. The members are the group. The flexibility and fluidity that are their great-

est advantages are also sometimes disadvantages. The greater the freedom, the greater the need for maintenance of a shared purpose .

Although U3A interest groups can be robust and have been known to withstand rough treatment, groups that are not well nourished (by the members) will eventually cease. The following is offered in the belief that some behaviour is likely to be helpful and some is likely to be unhelpful.

A

The following strategies may help to revive struggling groups.

The static group.

- Because there is comfort in routine the group that meets at the same time, in the same place and does the same thing may last a long time, but it will eventually become stale. It is useful to build variety into the programme, to vary the form, the delivery, and the venue. If you usually have discussion, occasionally invite a speaker, if you are usually tutored occasionally have a discussion, if you usually sit indoors, plan a related trip away.
- Some groups bond too successfully and rebuff new members, often unwittingly, and this is not healthy in the long run. This is not in the ethos of U3A. Have the occasional open meeting where non group members come for 'an afternoon with the (SUBJECT) group'. All groups should be able to welcome guest attendees who wish to understand the group and may choose to join .
- Consider a 'Shared Learning Project'. This can re-focus a group and give new purpose.

The failing group

- If a group is losing members the first thing is to find out why. This may be as easy as asking those who have left and also those who remain. There may be a specific problem with which the group can deal. Sometimes the dominance of the Group leader is the problem.
- If you identify the problem as unhelpful behaviour of a member of the group, then action must be taken. Contact the Group Coordinator who has responsibility for supporting groups. *There are strategies for handling inappropriate behaviour, but there is not a single one that will cure all ills.* You might also benefit from sharing your thoughts with other group leaders.
- If a group is simply lacklustre, then it may respond to a treat, a special speaker, a special outing, a short course. If this project is then opened to the U3A as a whole, the group might also gain new members.
- It may be that the group, in that form, has run its course and the best action may be to close it, wait a while, and then re-launch it.

D. PROBLEMS

Group leaders sometimes have very high expectations and it should be remembered that learning and sharing takes place each time the interest group meets. You might have before you the ideal of every member teaching and learning in equal measure, but this is not going to happen within every group every time. Rather, keep before you the ideal of providing a learning situation where each individual is encouraged to contribute as much or as little as they are able at a given time. If everyone feels comfortable enough to contribute, then it is a good learning environment. They also learn who listen quietly.

If you do have a problem with your group do not despair and remember that you are not alone. There is, unfortunately, no one solution that fits all, and in most cases it is a matter of trying different things until one succeeds.

The first place to look for help is to the group itself. The leader does not have the problem, the group has the problem. Often the solution is there, and a healthy organic group will self heal, but this can only happen if the members of the group share any concerns, and are encouraged to address them together.

The next place to look for help is to your Group Co-ordinator, or other Group Leaders.

There is also the National U3A , *who may have a person nominated for learning support, or have plans in place for the support of group leaders that will help you. This may involve sharing your experience with a group leader in another U3A.*

If your problem does not respond to the advice gained in this way **then contact the National Education & Development Officer** who may be able to help you by telephone or email. They may be able to visit you or may know someone who can! The officer will record problems and refer them to the Education and Development Committee so that they can respond centrally. It is likely that if you have a problem then so do others.

E. Resolving Grievances/Disputes

From time to time there may be disruptive behaviours or major disagreements in a group that detract from the group experience. Often this can be amicably resolved by speaking with those involved. If this approach is not effective, contact the Group Coordinator whose role it is to support groups and Group Leaders.

This section was adapted from 'Advice for Group Leaders' from The Third Age Trust.

SECTION 3 - FORMS. Do we want this? How about a less formal monitoring- e.g. number of meetings, range and mean numbers of attendees? And topic headings (or destinations if it is field work- including cycling of course)

**PURBECK U3A
Class Register / Attendance Sheet 2015 / 2016**

Group _____ **Leader** _____

Term: Autumn / Spring / Summer

Name	Tel.No.	U3A No.	Date	Date	Date	Date	Date	Date	Date	Date

MEMBERS WAITING TO JOIN GROUP (Refer to National U3A Advice Sheet No.12)

Name	U3A No	Contact details (Email)

NB This form should be returned to the Group Coordinator in December and May in order to monitor group sizes.

Please make copies before use and indicate appropriate term. This form is also available electronically.

We wish to support our Groups and further develop Purbeck U3A, by purchasing necessary material or equipment, but all purchase requests should be directed to the Treasurer.

The general rule is that consumables, costs for speakers, etc is paid by the group. Usually the Group Leader sets up a Speakers fund and members contribute £1.50 - or whatever is considered necessary – at each meeting.

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

Travelling expenses on U3A business will be reimbursed after discussion with treasurer. This does not include travelling to Group or Committee Meetings.

Capital expenditure for equipment or other necessary items for the group should not be purchased without prior consent. Purbeck 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 in excess of £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.

The Expenses Claim form should be completed, either on line to purbecktreasurer@purbecku3a.org.uk or given to the Purbeck Treasurer. Please include your bank account number and sort code so reimbursement may be made on line.

Your details will be held in a safe environment.

**PURBECK U3A
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

PURBECK U3A - 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:

SECTION 4. U3A Equipment Inventory & Venue Hire

Equipment Loan

Purbeck U3A owns equipment available on loan to groups. This is normally for a short time. Should a group require a longer term loan, i.e. it is required for every meeting, this can usually be arranged. It would be best to ask the Groups Co-ordinator or Purbeck Treasurer for advice on this. For short term loan please contact Treasurer on purbecktreasurer@aol.com ;(is this correct??)

Equipment Currently Available

ITEM	QUANTITY
Flip Chart and Stand	1
Extension Lead	2
Projector Screen	1
Projector Stand	1
35mm Slide Projector	1
Optima Projector – Spare Lamp	1
Presentation Clicker	1
Public Address System, inc. Hand-held and Clip-on mics	1
Exhibition Stand	1
Banner	1
Scanner	1
Language Pack – German	1
Language Pack – Italian	1
Language Pack – Spanish	1

Should other items be required, contact the Groups Co-ordinator or Purbeck Treasurer to see if assistance can be given.

VENUE BOOKING AND PAYMENT POLICY

Generally a hall is required when either:-

- 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.

Overleaf is a list of all venues available in the Purbeck area. They are all used by Purbeck U3A so those responsible/caretakers know who we are.

Decide which venues would be most suitable for your group, make arrangements to visit them and check availability for the dates you require. Also check 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, others just ask that payment is made by standing order 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.

QUALIFICATION FOR VENUE PAYMENT; Treasurer should check this is still ok

Payment for monthly or twice monthly venue hire is funded totally by Purbeck U3A. There is one exception to this for groups who meet weekly.

For groups meeting weekly, Purbeck U3A will fund a maximum of 30 meetings a year.

Groups are encouraged to use the lowest cost venue that meets their needs .

A list of local halls , contact details for booking , and charges for their various rooms is appended

VENUE DETAILS; Mark I think you have an updated list

Full details of the main venues in the Purbeck area are listed below. Those marked with * have a main hall and a smaller room as well.

AREA	CONTACT	PHONE	EMAIL
CORFE CASTLE			
Corfe Castle Village Hall *	Carole Speed	01929 480652	carole.speed@oracle.com
Corfe Castle Library (small)		01929 480760	
SWANAGE			
All Saints Church	Mrs Pauline Bexon	01929 423265	paulinebexon@yahoo.co.uk
Harmans Cross Village Hall*	David and Tina Hollister	01929 480540	davidhollister@hotmail.co.uk
The Mowlem Centre	David Bale	01929 422880	d.bale@btopenworld.com
Queensmead Hall	Purbeck Housing Trust	01202 308642	info@purbeck.housing.co.uk
Rectory Classroom	Karon Quirey Parish Office	01929 421117	Swanage.team@btinternet.com
St Edwards Church Hall (The Catholic Hall)	Mrs Sheena Foot		edwardinefoot@hotmail.com
Youth and Community Centre	Catrina Humpherson	01929 423421	c.humpherson@dcc.gov.uk
WAREHAM			
Carey Hall	Mrs Ann Selby	01929 556527	
Corn Exchange (Town Hall)	Wareham Town Council	01929 553006	clerk@wareham-tc.gov.uk
Furzebrook Village Hall*	Mrs Clair Green	07845 853727	clairmarlow@yahoo.co.uk
Masonic Lodge	Nigel Evelegh	01202 632724	nigel@paula-accounts.co.uk
Methodist Church	Mrs J Holloway	01929 552619	

Parish Hall (Quay)	Wareham Team Ministry	01929 550905	
United Reform Church*	Mrs Jill Franklin	01929 425511	
Wareham Library		01929 556146	warehamlibrary@dorsetcc.gov.uk
Wareham Scout Hut*	Mrs A Chamberlayne	01929 552235	annechamberlayne@btinternet.com
WOOL			
D'Urberville Centre	Mrs Dawn Crewe	01929 462064	dawncrewe@hotmail.co.uk

OTHER PURBECK VENUES			
Location	Venue Name	Postcode	Contact No
Bere Regis	Drax Hall	BH20 7LD	01929 471022
Bloxworth	Bloxworth Village Hall	BH20 7EG	01929 459419
Briantspuddle	Briantspuddle Village Hall	DT2 7HT	01929 471497
Chaldon Herring	East Chaldon Village Hall	DT2 8DL	01305 853037
Church Knowle	Village Hall	BH20 5NG	01929 481336
“ “	Church Knowle Reading Room	BH20 5NG	01929 480341
Corfe Castle	Millenium Pavilion	BH20 5EE	01929 480200
“ “	Corfe Castle Town Hall	BH20 5EE	01929 480659
Kimmeridge	Kimmeridge Village Hall	BH20 5BP	01929 480064
Langton Matravers	Scout Hut	BH19 3HB	01929 444732
“ “	Village Hall	BH19 3HA	01929 426654

Sandford	Holton Lee Barn	BH16 6JN	01202 631063
Stoborough	Village Hall	BH20 5AD	01929 556349
Studland	Village Hall	BH19 3AJ	01929 450311
Swanage	Emmanuel Baptist Church Hall	BH19 1BE	01929 427706
“	Herston Community Centre	BH19 2SF	01929 426571
“	United Reform Church	BH19 NY	01929 424404
Winfrith Newburgh	Village Hall	DT2 8LR	01305 835876
West Lulworth	Village Hall	BH20 5SG	01929 400759
Wool – East Burton	Village Hall	BH20 6HE	01929 462083
Wool – Bovington	Memorial Hall	BH20 6LB	01929 403595
Worth Matravers	Village Hall	BH19 3LQ	01929 439001



634004 0240 9263 9485

SECTION 5 – COMMUNICATIONS

Within Purbeck U3A there are 4 main methods of communicating with the membership as a whole. These are:-

- Broadcasts
- Website
- E-Mail
- News bulletins

The major method is the newsletter. Detailed information on preparing and submitting contributions to the newsletter are set out below.

Not sure Ann Churchill still does this- but presumably generic email address is still correct

BROADCASTS: A means of letting all members know about something that may be of interest to them. This could be a forthcoming event or trip which is open to other members, news of a new group starting up or an invitation for new members - just a few examples. Your proposed text should be emailed to broadcasts@purbecku3a.org.uk Ann Churchill, committee secretary at churchillannp@gmail.com . She will then ensure it is sent out to all members via email.

WEBSITE: The most common reason for posting items on the website is because of changes to group information – venue, dates, group leader. Any changes to group information should be sent to Sue Galise who is responsible for keeping the groups list up to date. She can be contacted at suegalise@gmail.com. Contact with the website will then follow on. Is this still the way to update website??

E-MAIL: Most members use their personal e-mail address for U3A matters. You may want to consider two alternatives: create a separate e-mail account purely for U3A mail, e.g. your mail address is joesmith@gmail.com, you alternative could be joesmith2@gmail.com. Another way is to show an anonymous email address on the website. This is then automatically redirected to your own nominated email address. Please read the “How to” at the end of this section.

Any changes to email addresses should be advised to the Membership Secretary, memsec@purbeck-u3a.org.uk, or to the treasurer ,to ensure that the mailing list is kept up to date.

MEETING POINTS

Meeting Points is held on the 3rd Thursday of every month at Harman’s Cross Village Hall. It is open to all members – in fact some of them only attend Meeting Points.

As well as 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

Notices for Meeting Points: You can submit a brief notice to the newsletter editor – newsletter@purbeck-u3a.org.uk - a week or so before Meeting Points. This will then be put on the screen for everyone to read – useful if you want to jog people’s memory about an event for example. Is this still correct?

QUARTERLY NEWSLETTER

The Purbeck U3A Newsletter is published quarterly, in colour, as a .pdf file broadcast to all members and on the website. A hard copy version is available for members unable to access it via the internet or who prefer to receive it in printed format. I don't think there is a regular one (is there a need? - probably yes but perhaps 'as required' rather than regular??)

Guidelines for Newsletter Contributors

The Newsletter is there for Group Leaders to use in 2 main ways – News from the Groups (page 7) and the Featured Group currently on page 5.

News from the Groups is *brief* notes for latest group news and updates – it could be the forthcoming programme or news of an interesting event that has taken place. It should contain the following information:-

- Group Leader's name, email address and/or phone number.
- Group venue, time and day of meetings and topics for the next 3 sessions, if applicable. Would News from Groups be better on the website?

Featured Group: this is by usually by invitation but group leaders are always welcome to contact the editor at newsletter@purbecku3a.org.uk – should they want information about their group published.

Preferred Text Formats:-

1. Length of article for featured groups: about 500 words for a full page. This is sometimes 250 words if 2 groups are featured. Group news should be briefer.
2. Word document (.doc) or Rich Text Format (.rtf).
3. Layout: Left justified, single spaced, single paragraph returns only.
4. Headings: as above but in BOLD if you wish.
5. Font: Body text: Times New Roman or Arial 12 pt.

Preferred photo/graphic image Format:-

1. Jpg format.
2. File size not more than 500Kb.
3. NO camera originals.
4. Subject title and names of people in close-up if possible.
5. Photographer – having checked they have given permission for their photo to be used.
6. Any copyright restrictions on the use of the image.

All contributions should be emailed to newsletter@purbecku3a.org.uk.

Please ensure that all files sent and the computer they are sent from are virus free.

PUBLICATION DEADLINES

The deadline dates are VERY important – please be aware that material received after the due date will not be published.

Publication Date	Deadline
Early February	15 January
Late April	5 April
Mid August	15 July
Mid November	31 October

Mark you might want to get Virginia to check the Newsletter stuff

SECTION 6. Health and Safety/Risk Assessment

Health & Safety

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

- a) Time, date and place of meeting.
- b) Suitability of the meeting place (look at the risks for the group members).
- c) Advising members of Health and Safety issues at the start of meetings.(Make sure fire exits are clear and easy to open). Electrical safety of equipment also needs verification
- d) Keep a record of who is present at each session with a consolidated register sheet.
- e) Each year check all members are paid up members of the U3A and thus insured against public liability claims should an issue arise.
- f) Keep the committee informed of issues arising particularly if a local solution is not found.

For example:

Cycling for Softies Group (2009)

A member hit a pothole on an off-road track and was thrown over the handlebars. This induced the group leader to draw up guidelines of minimum requirements for cyclists who join the cycle ride. This can be used as an example of how Health and Safety Guidelines can be drawn up for a group of this sort.

Walking groups have a checklist to follow from the National Topic lead.

NB Risk Assessment: A risk assessment template to use as a guide is available from the Group Coordinator if required.

St John Ambulance Pocket First Aid sheet Enclosed in this Handbook and you should be familiar with this information.

ICE - (IN CASE OF EMERGENCY) Telephone contact numbers may be useful for some groups, so that you can contact someone if there is a problem with a member. U3A key rings are available to keep such details readily available and members may be interested in purchasing these. (£ 1)- are they still?.Mobile phones can be searched for emergency details if one knows how

SECTION 7 – Insurance Details

The Third Age Trust insurance brokers, currently Arthur J. Gallagher to December 2015, provide insurance to the U3A which includes: Public & Products Liability, Home Contents, and Trustee Management liability. (Full details area available on the U3A National website members' page).

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.

Members should note that personal accident insurance is not included (I presume that applies to Group Leaders too)

Since 23rd April 2007, dogs belonging to U3A members on a U3A walks are covered by U3A insurance. This has been an issue in the past with badly behaved dogs so ground rules are needed for such a group. Children occasionally attending U3A groups are also covered by the insurance. It is advisable to agree a procedure so that Group Leaders know how to deal with request. (Lin Jones National Administrator 2007).

Mark I think an updated U3a insurance document is on shared Googledrive



THE UNIVERSITY OF THE THIRD AGE

THE THIRD AGE TRUST

19 East Street, Bromley, Kent, BR1 1QH

Telephone: 020 8466 6139 • Fax: 020 8466 5749

e-mail: national.office@u3a.org.uk • web site: www.u3a.org.uk

U3A LIABILITY INSURANCE

This document is designed to be an 'at a glance' guide to the very complex subject of Liability Insurance. Should you need further clarification then please refer to Lin Jonas at the National Office (0208 466 6139).

Public & Products Liability

The cover will indemnify U3A members against all sums which you may become **legally** liable to pay as a result of

- Accidental bodily injury to, or death of, any person.
- Accidental loss or damage to material property not belonging to you.

arising from or in connection with a **U3A activity**.

Incidents not covered

- Injury or damage sustained due to a defect in a hired building.
- Injury or damage sustained whilst under instruction with a third party i.e. a specialist instructor.
- Injury or damage sustained whilst participating in hazardous activities such as abseiling, handgliding, whitewater rafting, bungee jumping etc **UNLESS** the activity has been cleared in advance by Lin Jonas.
- Claims where no injury or damage is sustained.
- Injury or damage arising from the result of a motor vehicle, aircraft or boat.
- Incidents which are not attributable to U3A activities.

April 2005

SECTION 8 - National U3A Website and Membership Area

The National U3A website has materials and news that may be of use and interest to you and your group. www.u3a.org.uk. This includes the Resource Centre, Online Shop, Document downloads, Subject Advice and Publications and also minutes from National U3A meetings.

Current members must register initially to access the Members area with user name and pass word. Some of the material in this handbook is from this National site.

Merchandise. A number of items are available from the website including bags, balloons, diaries, key rings with ICE details,

National U3A Subject Advisers

Study Group Leaders and Helpers - you are not alone!

Each subject listed on the national website has an Adviser whom you can contact directly. For example; Archaeology, Art appreciation, Classical music, Creative writing,]Current affairs, Cycling, French, ICT awareness, Jazz appreciation, Languages, Music-singing and playing, Painting for pleasure, Philosophy, Photography, Science, Technology and society, Textile crafts, Walking and Wine appreciation.

These are also listed in the **Third Age Matters** newsletter. The contact details and form is also available from the individual subject page.

In some cases there is also material available online that you can use or adapt to meet your needs. You can also browse all available Subject Start Up leaflets and latest newsletters. These are also available from the individual subject pages.

Also visit the [Resource Centre](#) for DVDs and other resources. You will need to register for a login to borrow any resources but you can browse before you register.

SECTION 9 – National U3A Advice Sheets

ADVICE SHEET No 1 - Accessibility for Disabled Members

Last March, I issued a statement which clarified the situation with regard to U3A members who could not manage to participate in their chosen U3A activities without help, by stating unequivocally that the liability insurance provided to all member U3As by The Third Age Trust would cover the attendance of a companion/carer.

However, this is not meant to suggest that U3As should not do all they can to be as accessible as possible both to their existing members and to third agers in their local communities who may wish to join. U3As must take all reasonable steps to ensure that people with disabilities can attend the interest groups of their choice, without necessarily needing a companion/carer with them and it is important to reassure them that you will do all you can to support them and make their attendance as easy and stress-free as possible

VENUES - GENERAL MEETINGS

As far as possible ensure your venue fulfils the following criteria :-

- Served by public transport
- Adequate car parking facilities onsite or at least close at hand including disabled parking bays
- Ramp for building access
- Ground floor accommodation or upper floor with lift
- Accessible and usable disabled toilet facilities
- Good disabled access for all types of impairments
- A loop within the sound system
- Spacious enough to cope with wheelchairs/mobility scooters
- Good lighting
- Access to heating/air conditioning controls

In addition consider the following :-

- Making a map and directions available for new members
- Having a designated person at general meetings who is easily identifiable, to ensure disabled members are provided with appropriate seating e.g. at the front for those who are partially sighted and at the end of a row for those with mobility problems etc.
- Timing and length – e.g not too early and not too late; not too long, without a break

VENUES – INTEREST/ACTIVITY GROUPS

Try to have a balance between groups in members' homes which tend not to be accessible and outside accommodation which ideally will be accessible to all. If you have a disabled member who wants to attend a group that is inaccessible for any reason please talk to one another. Investigate whether any members who are struggling to attend a class in private accommodation, could either host a group themselves or arrange for it to be hosted at their place of residence. Most issues can be resolved with negotiation.

COMMUNICATION

Ensure that a member of the committee is responsible for maintaining contact with all disabled members to discover whether anything can reasonably be done by the committee to make life easier for them whilst they are participating in U3A activities e.g. organising a car share scheme.

Don't assume you know the problems/difficulties they face. Talk to them.

February 2011

INTRODUCTION

Older people often do not like to admit that they are experiencing hearing loss, either to themselves or others. Having a hearing loss varies for many from mild to severe. Hearing aids can help by amplifying any sounds received but it is the experience of being cut off from people and social situations that is the most difficult to overcome and this can lead to self-imposed exile. In addition, it is very difficult for people with hearing loss to hear anything when there is extraneous noise around them, i.e. in group situations where more than one person is talking at a time.

ADVICE - LARGE MEETINGS

- **VENUE** Try to use a venue with a loop system.

Encourage those who are hard of hearing to sit nearest the speaker and consider reserved seating.

Always check that everyone can hear what is happening.

- **SPEAKER - VIEW** Position the speaker away from a direct light source so that people can lip read. Keep the background plain.

Do not have the speaker placed too high up which makes lip reading more difficult.

Ask a speaker if a text copy could be provided or at least a précis of the main points either as a hand-out or on a flip chart.

If the speaker needs lighting to be reduced for a power point presentation, try to ensure there is a lectern light so that the face can be seen.

- **SPEAKER - SOUND** Ensure that the speaker uses a microphone and preferably a lapel microphone. If it has to be hand held, remind the speaker to keep it away from the mouth so that lips can be read. Ask the speaker to speak slowly and distinctly and not to look away and talk.

ADVICE - SMALL MEETINGS

- Use a portable loop system where possible.
- Lay out the room so that the participants can all see one another's lips - boardroom or horseshoe.
- Participants should be encouraged to only speak one at a time.
- If someone wants to speak encourage use of a hand signal of some sort to attract attention.
- Make notes available as soon as possible.

EQUIPMENT TO CONSIDER

- **U3A**
 - Portable Loop Systems – approx £1200.
 - Infrared Systems - approx £3000.
 - Loophear - approx £135.
 - Clipboard with internal induction loop and integral microphone - approx £175.
- **U3A MEMBERS**
 - Personal enhancers – approx £60.
 - Digital personal listeners – approx £70.
 - Elite listeners – approx £350.

EQUIPMENT ADVICE AND SUPPLY

- Action on Hearing Loss (formerly RNID) have a brochure of quality products called Solutions which can be ordered online (<http://www.actiononhearingloss.org.uk>), downloaded from <http://www.actiononhearingloss.org.uk/shop-support-pages/download-our-catalogue.aspx> or you can telephone 01733 361199, textphone 01733 238020 or email solutions@hearingloss.org.uk

- Sarabec Limited – <http://www.sarabec.com>. Telephone 01642 247789. Textphone 01642 244148. Email mail@sarabec.co.uk

OTHER USEFUL CONTACTS/RESOURCES

- National Association of Deafened People – <http://nadp.org.uk> and its fact sheet – <http://www.nadp.org.uk/factsheets/fs01.htm>
- British Deaf Association – <http://www.bda.org.uk>
- Hearing Link – <http://www.hearinglink.org>
- Deafness Research UK – <http://www.deafnessresearch.org.uk>
- United Kingdom Council on Deafness – <http://www.deafcouncil.org.uk>

April 2012

ADVICE SHEET No 6 - Sorting Out Problems/Grievances

In any organisation, problems and grievances will occur from time to time and it is important that members know where to turn for help, advice and support, so that whatever the issue, it can be dealt with quickly and objectively and appropriately.

PROBLEMS FOR A GROUP LEADER WITHIN AN INTEREST GROUP

Problems can arise within a group e.g.

- Disruptive and/or unsocial behaviour
- Poor attendance/timekeeping
- Unsuitability
- Failure to pay fees
- Disagreement between members

and in most cases the Group Leader will be able to sort it out by talking to the member/members in question and resolving it informally and amicably.

If this fails and the problem persists the Group Leader should refer the matter to the Groups' Co-ordinator on the committee or if that role does not exist, the trustee on the committee designated to deal with problems/grievances. The Group Leader should not allow a situation to continue which impacts on other members of the group.

PROBLEMS WITH THE GROUP LEADER

Initially the member/members should try to resolve the problem by discussing it with the group leader. However, if this is unsuccessful or if the member/members involved feel unable to do so, the matter should be referred to the Groups' Co-ordinator or the designated trustee.

GROUP LEADERS SHOULD NOT HAVE THE AUTHORITY TO EXCLUDE A MEMBER FROM THE GROUP (under any circumstances???)

INITIAL PROCEDURE WHEN A PROBLEM/GRIEVANCE IS REFERRED

- Establish the facts quickly, consulting as many people as possible
- Have an informal discussion with all concerned to summarise the problem, hear everybody's views and clear the air
- If you feel there is a case to answer but that nevertheless it is a relatively minor issue, make it clear to all present that there must be no repeat of the sort of actions/behaviour which led to this problem
- If you feel that the situation warrants a more formal approach or a particular course of action e.g. exclusion from an interest group, you should refer the matter to the committee which will agree a course of action.

PLEASE REMEMBER THE FOLLOWING

- You must ensure every action you take is documented
- You must deal with problems and grievances quickly and fairly
- You should do all you can to settle the issue without having to resort to formal disciplinary action
- You should maintain confidentiality where possible

23 February 2011

NB The full version of this Advice Sheet regarding all U3A matters, is available from the National website.

ADVICE SHEET No. 8 – Social Events and Travel

Many U3As arrange excellent “social” events for their members ranging from outings to Christmas lunches, as well as organising travel either in the UK or Europe which either be for a specific study group or for all members. The purpose of this advice sheet is to recommend best practice, to make you aware when you are covered by U3A insurance and to ensure that neither participating members nor the organisers are putting themselves at risk.

There are three types of activities that are considered in this advice sheet:

1. Day events; travel only, open to all members of the U3A.
2. Study Group overnight trips; including both travel and accommodation.
3. Holidays; open to all members of the U3A.

Organiser

Such activities, once the committee has given its approval, are normally put together by an organiser or a small committee. The organiser is responsible for making the bookings, arranging the transport and accommodation or in the case of a holiday, arranging the travel package with the travel agent/company. However, all the financial arrangements must be overseen by the main committee of the U3A, usually the Treasurer. In addition all contracts must be signed by a Trustee on behalf of and in the name of the U3A. When organising day events or overnight trips, care should be taken in making any prepayments, as there is no insurance provided which will protect you should the supplier go out of business.

Social Events

The organiser will arrange an event at a suitable date with the venue and then, in liaison with the Treasurer, arrange with the venue and transport operator the contract, deposit and method of payment. The organiser and Treasurer will then agree a “sales” price usually including a small mark-up as a contingency. The prospective attendees will usually contact the organiser direct to make a booking and send a cheque but in some cases it may go directly to the Treasurer. All cheques should be made out to the U3A and to the U3A social account in particular if one exists. The organiser must never collect cash, cheques in his/her name or pay for a venue or coach by means of a personal debit/credit card or cheque. Ignoring this will mean that it becomes a personal rather than a business transaction and it could have insurance implications and place the organiser at financial risk. In order to ensure that all monies are handled correctly, all payments must be made with the full involvement of the committee, with cheques being signed by two trustees.

Study Group Trips

The organiser in this case will be the group organiser/leader but the process is similar to that detailed above for Social Events, except that accommodation is required and is included in the price. By arranging such trips, the organiser could be considered under the EU Group Package Travel Regulations to be the tour operator and therefore liable for any damages or accidents that might occur. So in order to safeguard the organiser, the Trust has arranged Tour Operator Liability insurance which will provide protection should anything untoward happen.

NB. All monies for study group travel should pass through the main U3A account

Holidays

As far as U3A holidays are concerned, the only safe way to organise them is through a travel agency/company so that you are fully covered by their liability insurance. In addition, it is recommended that all payments be made on an individual basis, directly to the company and not to the U3A. In this way a contract is clearly established between an individual and the company rather than with the U3A as an entity, which is a much safer way to do it. (I am not sure how that fits with advice above to ‘book things as a business for

insurance purposes') There is, however, no reason why the organiser should not collect cheques and then either send them in one batch or deliver them.

If you do organise a holiday yourselves, you will have no money insurance and in the event of a serious incident on holiday involving a U3A member or members, you would have no insurance in place to protect you and the organiser(s) could be deemed personally liable and in serious trouble.

Insurance

As long as the basic procedures outlined above are followed, then the liability insurance we provide will cover your day events and your study group overnight trips in the UK and Europe, both with respect to third party liability, your group organiser and member to member cover. If you wish to extend an invitation to members of other U3As that is fine.

It is also acceptable to have a non-member attend a day event with committee permission, providing it is not a regular occurrence for that person to do so..

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.

Other Matters

1. Charity Commission for England and Wales.

Income and expenditure associated with social events does not have to be included in the official annual return. Their definition of social is wide ranging, but it is safe to define it as any event open to all members and not specifically part of an interest group activity, for which members pay to participate. Thus both social events and holidays as listed above would qualify as social. Whilst the Charity Commission does not need the information on social events, your members are entitled to have a full report, therefore it is recommended that the income less expenditure is shown in the accounts as nett income. Note that whilst an individual event might make a small loss the U3A cannot support a subsidy on an annual basis so this item should always be positive.

2. Free Trips.

It is a recognised practice that Tour Operators offer a free trip for, say every 20 members booked but it is up to the committee how these freebies are dealt with, not the group organiser. It is strongly recommended that you adopt a policy of sharing them all out by applying a discount to all travellers whilst retaining the discretion to reflect service from the organiser which is above and beyond what you would normally expect. If, however, the organiser is a trustee, a free place should not be offered as trustees must not receive any personal benefit whilst in the role. In view of the above, it is incumbent on all U3A committees to ensure that any travel operations are run in a properly regulated manner.

3. Cancellations.

Usually if a potential attendee cancels with sufficient time, the organiser can recover some or all of the cost from the venue but not the share of the transport. The main committee should decide what its policy is in this matter and issue guidelines as it is not reasonable for the organiser to have to handle this situation without guidance.

4. Use of Debit/ Credit Cards

It is bad practice to use a personal credit or debit card. As more and more venues will only accept payment by card it will become essential for U3A to arrange a card on their account. All major clearing banks have now agreed to offer debit cards to charities, although it may take a bit of time with some of them. The suggested conditions for their use are contained in the booklet 'Information for Treasurers'.

20 January 2014

ADVICE SHEET No 10 - Licences

Photocopying

Under UK copyright law you are only allowed to copy an insubstantial amount of copyright material for personal use for the purposes of private study or non-commercial research, but the law does not define insubstantial. There is no magic figure or percentage applied as each case would be viewed on the basis of the perceived importance of the extract rather than simply the quantity.

A Copyright Licensing Agency (CLA) licence allows multiple photocopies from books, journals and magazines. Extracts can be up to 5%, one chapter or one article, whichever is the greater.

The licence costs £60 and runs until 31st July each year, regardless of when you actually take it out.

If you want to purchase a licence please send a cheque for £60 made payable to The Third Age Trust.

NB. It does **not** allow multiple copies of maps, charts, newspapers or printed sheet music including the words

Licences for copying maps and newspapers can be purchased from the following organisations if you feel you need them:-

- Ordnance Survey – 08456 050505 www.ordnancesurvey.co.uk
- Newspaper Licensing Agency - 01892 525273 www.nla.co.uk

There is no blanket licence available for multiple copying of sheet music; this is always illegal unless it is no longer in copyright. (Copyright lasts 75 years).-check this If you would like help and advice on obtaining copyright clearance you can look at Frequently Asked Questions on The Music Publishers' Association website www.mpaonline.org.uk or contact them on 0207 580 0126.

There is also some free sheet music available on the internet at www.cpd.org.uk and this will give you links to other useful sites.

Digital Images

There is a common misconception that anything on the internet is in the public domain and therefore free to use. A work only falls into the public domain once copyright expires. It may be publicly accessible but it is not necessarily freely available.

Recorded Music

The PPL licence supplied by The Trust gives U3As permission to play recorded music in public.

DVDs/Videos

The Third Age Trust has no blanket licence arrangement with film copyright holders or organisations.

Interest groups are usually covered by an exemption in the Copyright Law which allows the use of videos or DVDs for educational purposes. You can find details in Fact Sheet P -01: UK Copyright Law dated 27th November 2009, which you can download from the website of the UK Copyright Service (www.copyrightservice.co.uk). It lists under acts that are allowed (under the Fair Dealing Exemption) i.e. performance, copies or lending for educational purposes.

This exemption does not allow the viewing of films for entertainment.

Two commercial companies offer licences for showings for entertainment:-

- MPLC 01323 649647 www.themplc.co.uk
- PVSL 0207 9845957 www.filmbank.co.uk

Each company licenses films from different Hollywood studios and independents so some U3As may wish to purchase both. Most U3As will probably not need a commercial licence but some decide to take it as it will allow them to show films if they want to and some have regular showings of recent cinema releases.

Performance - PRS Licence

This covers the use of the actual lyrics and composed music in any public performance of music.

It is the sole responsibility of the proprietor/manager of the premises you are using to have a licence arranged.

Further information can be obtained from the UK Copyright Service – www.copyrightservice.co.uk

5 September 2012

ADVICE SHEET No 12 - Waiting Lists

We are privileged to be part of the U3A movement, the growth of which speaks volumes for our relevance and appeal to third agers throughout the UK. All U3As will want to honour the wish of our Founders that the U3A experience be available to all third agers who desire it and two of the fundamental aims of the U3A movement are:-

- To make U3As accessible to all older people.
- To encourage the establishment of U3As in every part of the country where conditions are suitable and to support and collaborate with them.

When they apply for membership of The Third Age Trust, U3As agree to reflect the founders' wishes and:-

- Encourage and assist in every way the formation of new U3As in neighbouring areas so that U3A membership is available to all who want it.

Waiting lists are a sign of our success but they go against these aims and are therefore to be avoided.

Short term waiting lists can sometimes be necessary and may be in place for a variety of reasons including:-

- The U3A has seriously outgrown its general meeting accommodation and needs to spend time locating a larger venue.
- Growth has been particularly rapid since the start and the committee needs time to catch its breath and take stock to ensure that the U3A is fulfilling its charitable purposes.
- There has been a sudden influx of people and there are few spaces available in interest groups.

However, long term waiting lists indicate a problem, for which the committee needs to seek a solution.

Long term waiting lists can be caused by:-

- A decision by the membership to limit its membership to a particular number so that it remains small friendly and cosy.
- No room in the general meeting venue and nowhere else to move.
- No space in interest groups.

The reasons may be different but the end result is the same – an undesirable situation!

- No influx of members with time energy, enthusiasm and new ideas.
- No change to what is offered and is available to members.
- All getting old together; average age increases.
- A very bad impression of U3A to those who wish to join.

What can be done to solve the problem?

- Read 'Growth Matters' and 'Keeping your U3A Vibrant'.
- Lift the cap on membership and explain to your members the reasons for doing so and the dangers of not doing so.
- Research alternative accommodation for your general meetings and if there is nothing available consider other options; first come first served/tickets/back to back meetings /associate membership which does not allow access to the monthly meeting. General meetings are important but interest groups are the lifeblood of a U3A.
- Don't wait for group leaders to appear; encourage a group of interested members to set up their own group using the Resource Centre.
- See whether some interest/activity groups could divide.
- Speak to other U3As in your network/region.
- Speak to your Regional Trustee and the National Office.

Remember, The Third Age Trust is ready to help and support you so if the situation persists, let's get together and discuss starting the process of setting up another U3A nearby to satisfy the local demand
22nd May 2012

ADVICE SHEET No 14 FOR GROUP LEADERS/CO-ORDINATORS/FACILITATORS

The intention of this advice sheet is to bring together on one sheet of paper all the advice relevant to group leaders/co-ordinators/facilitators which is included in various publications produced by the Trust. It should not in any way contradict or undermine any guidelines issued by your committee.

Groups held in outside accommodation

- If you are responsible for selecting a suitable venue make sure you consult the risk assessment checklist and Advice Sheet 1 – Accessibility for Disabled Members.
- Don't sign any rental agreement yourself – pass it to your groups' co-ordinator for the committee to deal with.
- When you arrive use the venue/day of use checklist to reassure yourself that everything is in place and as it should be. If you have any safety concerns then **do not continue** if they cannot be resolved to your satisfaction.
- If your activity takes place in a workshop/outbuilding consult the risk assessment checklist for a workshop activity.

Your members

- Ask your members to provide you with contact details i.e. telephone numbers/email addresses.
- Ensure everybody attending is a member and always check when any new faces arrive.
- Prospective members or non-members are allowed to attend one meeting before joining
- If you have a situation where a non-member appears to see whether U3A is for them, advise the committee afterwards and if a member brings a visitor establish whether permission has been given by the committee. If not explain that in future for insurance reasons prior permission is essential. (Is this correct?)
- If a member stops coming try to find out why.

Problems

- In the case of an accident complete an accident form or send a detailed report to the committee, including details of witnesses.
- If emergency first aid is required follow the recommendations on the First Aid sheet and if you have a smart phone it may be useful to download a free first aid app from the Red Cross.
- Remember personal accident insurance cover is **not** provided by The Third Age Trust.
- If damage is caused to property by a member of the group, take full details, as it may in future be the subject of an insurance claim.

- Should you have a difficult member whose behaviour is regularly impacting on other members of the group go to your Groups' Co-ordinator for help.
- If you have a serious problem in a session, it is quite acceptable to ask a member to leave but contact your Groups' Co-ordinator as soon as possible after the end of the session.
- If you have a member who is not able to cope independently, inform your Groups' Co-ordinator.

Self –financing groups

- Never open a bank account.
- Never put members' money into your personal account.
- Give receipts and avoid cash where possible.
- If you do hold cash, ensure you do not exceed any limit laid down by your U3A and follow any guidelines for paying in cash.
- Get receipts where possible when you hand money over.
- If you are using your own credit card to pay for group events consult your treasurer for advice.
- Report as regularly to your treasurer as you are required to do so.

Group organisation

- Make sure you give sufficient information for group members to make an informed choice as to whether they wish to participate and then let them decide. This is particularly important if you are running a physical activity.
- Remind members if you are doing a physically active subject that they undertake it at their own risk.
- If you are leading walks, have a look at the walk leader checklist. (available from the National website)
- If appropriate to your activity have a copy of Advice Sheet 10 on Licences which covers photocopying, recorded music, dvds/videos and performance.
- If you provide written material and use the U3A logo make sure it is correctly displayed. See Advice Sheet 9.
- Delegate where you can and spread the load.
- Use the resources available from the Third Age Trust

The Resource Centre – 020 8315 0199/resource.centre@u3a.org.uk.

Sources – an educational journal – which is included with the direct mailing of Third Age Matters, is available on request from the National Office and is in the members' area of the website under 'document downloads' with a link via 'publications'.

Subject Advisers – see website for details – www.u3a.org.uk.

If you need any of the above contact the National Office – 020 8466 6139/national.office@u3a.org.uk

Finally, never forget that

Whatever happens you are fully protected by the liability insurance policy provided by the Third Age Trust.
(I think this is only true if all the rules are followed..)

You are the life blood Group of your U3A - without you there wouldn't be one!

17th September 2012

SECTION 10 – EQUAL OPPORTUNITIES

The Third Age Trust

Equal Opportunities Policy Declaration

All affiliated University of the Third Age (U3As) pursue an equal opportunity policy and as far as it is within their power to do so, provide equality of treatment to any person in their third age regardless of:

- Educational background
- Sex(including marital status and gender reassignment)
- Sexual orientation (including civil partnership status)
- Race or racial group (including colour, nationality and ethnic or national origins)
- Religion or belief
- Disability; (Is there an obligation to make reasonable adjustments or does DDA not apply?)
- Social Status

U3As are committed to the furtherance of fair treatment and the absence of discrimination in all their activities and strive to achieve a membership which reflects the composition of the community they serve.

April 2022