



## Southwell u3a

### Interest Group Leaders Handbook

This document aims to provide advice and support to interest group leaders. The U3A is dependent on its members for setting up and running groups. These notes have been written with the aim of supporting any member wishing to lead or organise a group.

#### Introduction

Thank you for agreeing to organise an interest group. We are sure you will find it very rewarding, though it might seem a bit daunting initially. This Handbook is intended to provide advice and support.

It is often said that interest groups are the life blood of the u3a and each group will develop its own structure. However, it is important to follow the ethos of shared, participative and self-help learning. 'The teachers learn, and the learners teach.' Groups need to be welcoming and enjoyable, as well as helping members to continue learning and enjoying many different activities and topics, in a friendly and sociable environment.

#### u3a principles

The u3a ethos is based on three principles:

##### The Third Age Principle:

- Membership of a u3a is open to everyone no longer in full time employment.
- 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.

##### 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.





## Types of group

- A study group with an educational aim but no limit to the number of meetings
- A social or activity group without a defined educational aim
- A study group with a specific subject to learn about in a set number of meetings

## Group leaders/convenors

- Groups need one or more members to make all the necessary arrangements and to manage the group finances
- A group leader may be an expert but this is not essential. Many groups run extremely well because members share and coordinate the activities and programme.
- Sharing out tasks, such as room booking, refreshments etc is always helpful.

## Running the group

1. Southwell u3a Committee includes a member with the role of 'Groups Coordinator', who is available to help you, if you are unsure of anything. There is also a 'New Groups Enabler', who supports the formation of new groups. Information about Interest groups can be given to all members through Newline (our Newsletter), the website and notices at the monthly meeting.
2. Group Leaders must complete a Risk assessment checklist form for their group. This is important so that there is a written copy of the checks that have been made. Templates are available on our website.
3. Group leaders should keep a register, and a record of all members' emergency contact details.
4. Contact information for Group leaders is available on the website and interested members should contact the leader directly.
5. Members of a group share any costs between them.
6. Group leaders are asked to ensure that the webpage for their group is kept up to date. Contact the webmaster who will do this for you.
7. It is important to check that all group members are fully paid up members of the u3a. The easiest way to do this is through Beacon.
8. Beacon is a secure Data management system that can be used to email a list of group members and record finances. Support on using Beacon can be given by the Membership secretary or the Webmaster.
9. In the event of an accident please complete an accident form (available at [www.southwellu3a.com](http://www.southwellu3a.com) or from the Groups Coordinator) and send a copy to the Secretary and to the Groups Coordinator. The Committee will review the forms to see whether there are any lessons to be learnt.



10. Both u3a members and non-members are allowed to attend two meetings of a group before deciding whether or not to join the group or the u3a.
11. In the event that a member cannot access a meeting independently, a carer is allowed to attend free of charge, without becoming a member, and will be covered by the Public Liability Insurance.
12. As a general rule, non-members of u3a cannot attend groups, group walks, etc, after their 'taster sessions' unless they have joined. If you are in doubt as to whether a person is a u3a member, you should ask to see their membership card.

However, in certain circumstances, occasional or casual attendance is allowed:

- if a member has a visitor staying, and their attendance would not prevent a u3a member from participating in, or detract from, the group activity or enjoyment. An exception may also be made for non-u3a partners attending some social events, if places are available.
- If a member needs to bring a carer, in order to participate in a group activity.
- In the Walking Groups, it is possible for a non-group member, e.g. partner/friend to attend an outing on an occasional basis, but this should not be a regular occurrence. On walks, grandchildren would be covered by u3a insurance, again, only on an occasional basis. Southwell u3a does not allow dogs on walks as this can spoil the walk for some members and dogs can increase risks around cattle.

NB. In these circumstances, non-members enjoy the same Public Liability insurance as u3a members. The policy is an insurance against the legal liability of the u3a, and is not a Personal Accident Insurance. It would have to be shown that u3a, its agents, or members had in some way been negligent in causing injury to the victim.

## Full groups

If your group becomes full, due to the size of the venue or the nature of the activity, please create a waiting list of members who express an interest in joining. It is also important to inform the Groups Coordinator that the group is full, as it may be possible to start another group.

A waiting list can be added to your Group's page on Beacon. Do ask for advice on setting this up. This has several advantages:

- If a waiting member changes their email/phone/address whilst on the waiting list, Beacon will update their details
- Beacon will 'date stamp' so that you know how long a person has been on the waiting list.
- You, and the Groups Coordinator, can see how many members are waiting.
- You can easily contact one or more on the waiting list using the Beacon email system

It is very important to make new members welcome by enabling them to join groups. Group leaders should do all they can to make this possible, perhaps by moving to a larger venue, or encouraging someone to start another group.

## Support for Group leaders/convenors

- The role of the Groups Coordinator is to ensure, as far as possible, the smooth running of the groups, and to offer support and advice to group leaders.



- One or more meetings of group Leaders are held each year. These are a good opportunity to meet with others and to share any successes or problems, as well as receiving updates about necessary processes and paperwork.
- Training workshops are provided nationally and can be applied for on the national website under 'Support for u3as'. One is called 'Interest Groups Matter' and is specifically for members organising groups.
- All policies and finance guidance can be found on the Southwell u3a website.  
[www.southwellu3a.com](http://www.southwellu3a.com)

## Forming a new group

The purpose of the u3a is to share knowledge, skills and experience and to meet the social needs of its members. It relies on the enthusiasm of its members and on their willingness to involve themselves in groups. A group can be established on any topic that interests you and those who wish to join. A group can be any size from two upwards, though most function best with six or more, and grow once established. If you would like to start a group talk to the New Groups Enabler who will help you with the process.

- 1) - Agree the development of your group with the New Groups Enabler.
  - Consider what interest there might be in the subject, perhaps by some informal soundings.
  - Consider what the aims of the group are – what are you hoping to learn/achieve/share by offering the group?
  - Will your group be a short course or ongoing?
  - Is there an existing national [Subject Adviser](#) who can support you with ideas for the development of the group? An alternative to Subject Advisers might be to contact neighbouring u3as to see if they have a similar subject group and then talk to the leader to get some first-hand knowledge. It may be that you could sit in on a group meeting.
  - In the case of new groups that may not attract enough interest to become viable, it may be possible to advertise to and allow members of other Notts. Network u3as to join the group, so as to achieve a viable membership.
- 2) - Agree possible wording with the New Groups Enabler that can be added to a new web page and our monthly Newline magazine. Both are good ways of attracting members. The Webmaster and Newline Editor are always pleased to support in this way.
  - Generate interest by promoting your group using as many other methods as possible, talking to members in groups that you attend and announcements at the Monthly meeting. The more methods you use, the more successful you are likely to be. It may take a month or two to attract enough interest to proceed.
  - Organise an initial meeting and invite people to attend. Identify any accessibility needs that group members may have.
  - Discuss the financing of the group with the Treasurer /Groups Treasurer and how this needs to be reported – if relevant.
- 3) - You must complete a [Risk Assessment checklist](#) for the new group before the first meeting. This is usually very straightforward. There are several different suggested templates available on our website. Please talk to the New Groups Enabler or Groups Coordinator if you need clarification. The completed form should be sent to the Groups Coordinator and will be linked to your website page. Individual members should be aware that the decision to take part in a u3a activity is theirs and that they should assess any risks involved.
  - It is important to keep a list of members' emergency contact details, in case of illness or accident.





## 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. Having a deputy and/or a Treasurer is always a good idea.
- 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.
- Agree the costs for running the group and what members will pay.
- Agree some ground rules e.g.
  - Be punctual
  - Let the leader know if you are unable to come
  - Listen to each other and allow others to speak
  - Agree to disagree amicably and be respectful, patient and encouraging to other group members!
  - Every contribution matters

The New Groups Enabler will probably attend the first meeting but if not, please feedback the decisions made.

- Sometimes there will be a demand for a group before anyone offers to organise it. In this case the new Groups Enabler will talk to those interested about what needs to happen and how the group could be organised. One person always needs to be the named contact.

## Sharing information

It helps to share information about, and within, your group which can be done in a number of ways:

- On the u3a website: [www.southwellu3a.com](http://www.southwellu3a.com)
  - By setting up a Facebook group or page
  - Via social media
  - In the u3a newsletter (Newsline)
  - Whatsapp group
- When using any forms of social media, be careful to abide by the GDPR (data protection) legislation, and if in doubt ask before posting.
  - Be aware of the needs of any group members who do not use computers OR use email but not other forms of social media

## Finances

Please look at guidance on our website. See under the 'More' tab, - Guidance notes and forms.

**Guidance for Group Leaders on Group Expenditure**, available to read onscreen and to download.

Other advice and forms are available on the website [www.southwellu3a.com](http://www.southwellu3a.com) under the 'More' tab. Please talk to the Treasurer or Groups Treasurer to clarify what you need to do.



## Resources

Southwell u3a has items available to use, such as Projectors, screens etc. If a new group needs particular equipment the Committee may be able to help.

## Other ideas

**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. Support for SLPs is on the national website.

**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, Future Learn.

**Networks, regions, neighbouring u3as:** allow you to draw on experience from within the movement. <https://nottsnetworkofu3as.weebly.com/>

**Regional Trustee:** will provide an overview of the region and a link to National Office. They can also offer advice and support.

**National Office:** The staff team are available Monday to Friday to offer support.

<https://www.u3a.org.uk>

020 8466 6139

- Regional Summer Schools
- Events facilitated by National Office
- National, Regional and Network Workshops and study days
- Outreach departments of universities

## Policies and procedures

Your Committee and/or Group Coordinator will advise you of the u3a Insurance arrangements as well as policies and procedures that you need to be aware of. These are all on the website:

[www.southwellu3a.com](http://www.southwellu3a.com)

[Car Sharing Policy](#)

[Complaints and Grievance Policy](#)

[Conflict of Interest Policy -](#)

[Disciplinary Procedure Policy](#)

[e-mail Policy](#)

[Equality, Diversity and Inclusion Policy](#)

[Investment Policy -](#)

[Managing Volunteers Policy](#)

[Member Code of Conduct](#)

[Privacy Policy](#)

[Risk Management Policy](#)

[Welfare & Safeguarding Policy](#)

It is recommended that you have a look at the advice section of the National Office website where a great deal of useful information can be found. It is also a good idea to sign up to the [Newsletter](#), that is sent out by the Trust every month as this will keep you up to date with wider u3a news. You can sign up to the newsletter via the national website.

<https://www.u3a.org.uk>

The sign up page for the Newsletter is under 'Events'.



## 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 with the advice section of the national website for further details on copyright.

The CLA Licence allows u3as to copy certain publications and take extracts from some published works. It does not allow u3as to freely use any images found online. Most images found by a Google search will be subject to copyright and cannot be used without permission from the photographer or payment to the copyright holder.

## 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 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 bring it into the open. Either you or another person could try to facilitate a discussion with the members concerned or with the whole group. It is important that the facilitator remains neutral and non-judgemental. If you cannot reach a resolution informally speak to your Group Coordinator or a member of your Committee. If a situation does not resolve and becomes acrimonious your Committee can consult the advice on disciplinary procedure provided by the Trust. There are also Trust Volunteers trained to help in resolving disputes.

## And finally. . .

Thank you for reading this far. Do enjoy your group and thank you!

