

## **u3a Group Leaders' Handbook**

### **The Aims and Guiding Principles**

#### **Preamble**

u3as in the United Kingdom are autonomous organisations, comprising locally-run interest groups which provide a wide range of opportunities to come together to learn for fun. Members explore new ideas, skills and activities together by the voluntary efforts of their members. All u3as also have a Committee of members to help with the organisation.

All u3as are affiliates of the **Third Age Trust** (a registered charity) which is their national support and advisory body.

#### **Aims**

1. to encourage and enable people not in full time paid employment to help each other and to share their knowledge, skills, interests and experience.
2. to celebrate the capabilities and potential of such people and their value to society.
3. to demonstrate the benefits and enjoyment to be gained and the new horizons to be discovered in learning throughout life.
4. to encourage the establishment of u3as in every part of the country where conditions are suitable and to support and collaborate with them.

#### **Guiding principles**

#### **Programmes**

- u3as offer activities which reflect members wishes and which aim to satisfy the widest possible range of interests: educational, cultural, recreational, physical and social.
- u3as seek resources appropriate to their interest groups from their memberships, from the Trust's National Support Systems and from outside organisations, both local and national. Increasingly these are accessed via the internet
- u3as make use of new technologies as they become available whilst always aiming to be inclusive of all members.

#### **Purposes, Styles and Methods Of Learning**

- The pleasure of learning is a driving force in the work of u3as.
- u3as neither require nor award any qualifications.
- By sharing their learning u3a members help one another to develop their knowledge, skills and experience in a social setting.

## Halesworth and District u3a

### Starting a new group.

#### Points to consider are:

1. when you will meet and at what time.
2. where the group will meet. Will you need to hire a hall or room?
3. what expenses are likely to occur.
4. how often will your group meet? Once a month or more often? Is it possible to avoid overlap with existing groups (see website for current groups listings)?
5. And, of course, if you subsequently need to make alterations to an existing group consult all members!

The Interest Groups Facilitator is there to help and will attend and help convene the first meeting—just ask! (see Contacts List on the website)

### Finances

Each group is responsible for its own finances. All costs should be calculated eg: materials, hire of hall, trips etc. Then the amount divided amongst the group members. Sometimes you may not get enough people to cover the cost of a hall hire due to illness or holidays so you will need to allow for this or ask everyone to pay irrespective of their attendance. Either approach is acceptable & each group can make its own decision.

Please keep **simple** records of income and expenditure. From time to time, The Treasurer of H&D u3a may wish to see these. If your group activity incurs significant sums of money, you may care to make more formal arrangements. The Treasurer will advise you.

### Risk Assessments and Incidents

Group participants are responsible for their own welfare, whilst group leaders, of course, should consider any possible risks associated with the group's activities. A pro-forma Risk Assessment Checklist in Word format is available for download from the Group Leader's page of the Halesworth & District u3a website. This Checklist can then be used to create a specific Risk Assessment Checklist tailored to your specific group. Risk Assessment Checklists should be reviewed and updated annually.

In the unlikely event of an incident causing concern to those involved, the Group Leader or a Committee member should fill in an incident report form (available from the website <https://halesworth.u3asite.uk/wp-content/uploads/2023/11/Incident-Report-Form.pdf>). The completed form should be sent to the Interest Groups Facilitator for retention (at least 3 years). The Committee contact details are on the website.

### Register

It is a good idea to keep a register of group members (names and contact details) e.g. in a notebook. All participants in an Interest Group are expected to be current members of the u3a, but a non-member can attend **one meeting** by way of a taster session. They are expected to join the u3a if they decide to continue. Membership application forms are available on the website or from the New Members Coffee Morning, usually held on last Friday of the month in The Cut Café. In addition to making new members welcome, please ensure they understand the group's policy on email communications – more details in section "Communication" below.

### Communication

Please keep the Interest Groups Facilitator informed of **any** changes to your group, using email via the Contacts List on the website. Group leaders who do not use email are strongly urged to delegate "communication" duties to a group member who does use email, since this is the primary method of communication used by local and national bodies. However, u3as are inclusive, and postal options or hand delivery of documents is possible. Please note, we have an "email policy" (given on website) that ensures we comply with General Data Protection Regulations (GDPR). This legislation prevents the unauthorised sharing of personal details such as email addresses. Briefly, this means that emails to group members should use the "bcc" option (see below). This ensures the individuals' email addresses are not visible to other members on the mailing list. If you feel this would hamper some group activity (eg asking for / offering lift sharing) you can, with **prior** agreement of the group members, use an "Open Mailing" list (ie email addresses are entered into "to" or "cc") so that members can contact other individuals and / or the whole group. On joining the group, a member should agree in writing (email retained by the group leader will do) to being on an Open Mailing list or they can opt out, which is most easily achieved by ensuring their email address goes into "bcc".

To	Hide Cc / Bcc
Cc	
Bcc	
Subject	

Among the roles of the group leader is making sure the **Group web page** on the Halesworth & District u3a website is up to date. This can be done by emailing the webmaster or the Interest Groups Facilitator (who needs to know about changes) for forwarding to the webmaster. This includes ensuring that the group leader's contact email address is correct as this is the route by which potential new members will make initial contact. Where possible the group should also be represented by some illustrations of their activity. This may include photos of the group or of their work.

If you are using Beacon, please keep the information on your group current and update it regularly. The Interest Groups Facilitator will give support and tutoring on the use of Beacon for using email and keeping records.

### Educational Resources and Support

Group Leaders can obtain a range of educational resources and support from the u3a national office (<https://www.u3a.org.uk>) [NB The Third Age Trust uses the word "convener" for the role that Halesworth & District u3a call "group leader".] To use this material you need to create a member's account. You can then access information just for members. Amongst the Resources are links to a network of over 70 national subject advisers, whose role is to provide advice on both the setting up of a group in their particular speciality and the sustainability of ones already in existence, which may benefit from new ideas or a different approach.

#### Additional considerations: -

The group leader should be aware of the policies of the Halesworth & District u3a including the constitution, finance, equality policy etc. These are all available to read on the Halesworth & District u3a website.

## **Halesworth and District u3a Group Leaders' Handbook (April 2025)** v.3.3

Part of our membership fee goes to the Third Age Trust which provides Halesworth & District u3a members (not non-members) with public liability insurance during their activities.

Member of a group have a duty of care to others in the group and of course, are responsible for their actions. In addition the group leader should ensure any new participant is welcomed & introduced to other group members at the first meeting they attend.