

BOURNE U3A

**Group
Leaders
Handbook**

September 2022

Groups are the life blood of the U3A, without group leaders, there wouldn't be a U3A.

Interest Group Leaders are likely to have some knowledge in the subject they are leading, however this is not necessary.

The important thing is to gather enough people in a Group who have some knowledge to share on the subject, or are willing to find out about the subject and share their findings.

Group Leaders should not expect to shoulder all the work required to run a Group, nor deliver all the material for study. Group Members are expected to help out with devolved roles or research, as seems fit and appropriate.

A copy of this guide is available on the Bourne U3A website

www.bourneU3A.org.uk Documents page.

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What do you need to do as a group leader?

Find a subject that you are interested in and believe that others would also find interesting.

Contact the Groups Coordinator (email; groups@bourneU3A.org.uk) to discuss and for help in setting up a new group. The group coordinator, will inform the Bourne U3A membership, by advertising the new group in the monthly newsletter, and announcing it at the monthly meeting. Names will be collected by the group coordinator.

If there is enough interest from members to start a group, the Groups Coordinator after meeting with you to discuss how you would like to run the group, will help you to set up the first meeting of the group.

If you decide to hold group meetings other than in a member's home, you have the option to hire a suitable venue.

Hiring a room means you must charge an entry fee for members to attend, which also means there must be enough interest, to cover the room hire charge for each meeting.

The cost of room hire stays the same if two or twenty-two members attend.

A record of members attending each meeting, how much money was taken as an entry fee, how much you paid for room hire and how much you took for refreshments if charged must be kept.

If you collect cash at each meeting, it is your responsibility to keep it safe. For this reason, if you have more than £100 on hand, the excess must be given to the Bourne U3A Treasurer, who will bank it on behalf of the group.

Groups must not use their own bank accounts for group funds. The Treasurer will return the money to the group, if needed in cash, or will pay an invoice on the groups behalf, from your funds held in the Bourne U3A bank account

You will be given access to the U3A beacon system. The coordinator will help you with this (See Beacon Guide)

This is a database where you will keep a ledger of the groups finances (which will save you producing a separate balance sheet each year), an up to date members list, and from where you can send emails to one or all group members.

Please obtain a receipt for any money spent, on room hire, speakers or refreshments.

At the end of each financial year (31st March), produce a balance sheet. This is so that you can let the group know where their money was spent over the year. You also need to give this figure to the Treasurer. Help with this will be given.

When starting a group, you will not have funds to hire a room, discuss this with the Groups Coordinator, who will grovel to the Treasurer, asking Bourne U3A to pay for the first meetings room hire

If the purchase of any special equipment is needed to run the group, speak to the Groups Coordinator, who will put this to the committee.

Bourne U3A has available for group use, a laptop computer, digital projector, and sound system. Contact the Groups coordinator.

If required you may hire a speaker to come and give a talk to the group. This would be at the group's expense

Paid tutors are not allowed as u3a members are expected to give their services free. However, if required you may hire a speaker to come and give a talk to the group. This would be at the group's expense.

Remember, we do not expect you to know how to start and run a group by yourself. The Groups Coordinator is always there to give advice or to help you achieve your aims.

There are some rules (isn't there always?)

1. To safeguard the good name of Bourne U3A
2. To be aware of Health & Safety best practices
3. To be aware of Equality & Diversity
4. To advise the Groups Co-ordinator of details relating to the group activities.
5. To up-date the Bourne U3A web-site with details of current events and activities. The Web Master will help with this.
6. To advise the Newsletter Editor of special events and updates for inclusion in the monthly newsletter.
7. To be available to talk to prospective members who may want further information about your particular group.
8. To keep records of group members' names and contact details, using the Beacon system, And to ensure that a register of members attending group meetings is completed.
9. To appoint a second in command in case of emergency (optional).
10. To ensure that non-members details, are passed to the Groups Coordinator, as they are allowed to attend no more than two Bourne U3A activities, without becoming members.
11. To ensure Bourne U3A guidance regarding financial arrangements are observed:
 - 1; Keep accurate records of all money on the group ledger on Beacon*
 - 2; If a group generates income in excess of £100, the excess should be passed to the Treasurer for banking*
 - 3; To be responsible for the safe keeping of any assets allocated to the Group*
 - 4; Assets cannot be disposed of without the prior permission of the Trustees*
12. Check in the group members list, that all people attending your group are 'Current' members, and at the beginning of December of each year, remind all of your group that membership renewal is due by 1st February.

GROUP TRIPS USING MEMBERS CARS

Use of Private Vehicles:

Drivers are advised NOT to charge a fee, or to accept a fee for transport of passengers, as this may negate your vehicle insurance (hire & Reward).

- a. Only U3A members (and their carers) may travel on U3A trips.
- b. It is important to remind drivers, who might use their cars to transport other members, that they should clear this role with their insurance companies first.
- c. Most comprehensive insurance should be adequate for use of cars on group trips.
- d. Passengers may make a small voluntary contribution to their driver towards transport expenses(fuel) of the activity. Both drivers and passengers need to be reminded that any contribution must be totally voluntary.
- e. The driver should make no profit.

The above points are made as a guide for organised trips only. Members may give each other lifts to regular meeting venues as this is a purely personal arrangement.

ORGANISED VISITS

If a deposit is required this might be advanced from Branch funds but must, of course, be paid back by the Group when monies are collected. However, should the trip not take place and the deposit lost, the Group will be responsible for any loss to U3A funds.

It is good practice to obtain a non-returnable deposit from each member wishing to go on a trip, at least sufficient to cover any deposits or pre-payments to be made.

GUIDANCE NOTES FOR ORGANISERS OF COACH TRIPS

These notes and the forms to which they refer are required to ensure that the Trustees and Members of Bourne U3A comply with the recommendations of the Third Age Trust and certain requirements of the Charity Commissioners.

- a.** Only U3A Members (and their carers) may travel on U3A trips
- b.** If you cannot fill the coach with members of your own Group, you may ask other U3A Groups to join you and if there are still spare places these may be filled by U3A members from another U3A.
- c.** When making coach bookings it is good practice to obtain two estimates from reputable coach companies.
- d.** In order to fulfil insurance requirements, it is important that the Executive Committee is advised of any proposed coach trip.
- e.** Provisional bookings of coaches can be made at any time but note that the monies due for the coach hire must be paid to the Treasurer preferably one month before the date of the trip and before the final contract for full payment. The Group Leader can then confirm the booking with the coach company.
- f.** If a deposit is required by the coach company this might be advanced from Branch funds but must, of course, be paid back by the Group when monies are collected.

However, should the trip not take place and the deposit lost the Group will be responsible for any loss to U3A funds (see paragraph 7 below).
- g.** It is good practice to obtain a non-returnable deposit from each member wishing to go on a trip, at least sufficient to cover any deposits or pre-payments to be made.

h. When collecting monies, it is important to keep as little cash in your home as possible. It follows, therefore, that monies collected should be paid to the Treasurer as soon as possible after they are received. Cheque payments should be made payable to Bourne U3A and are not to be made payable to the trip organiser personally. All monies collected should appear on the coach trip income sheet.

i. Note: The U3A cannot act as a tour operator. This has wide implications but does mean that the individual who has organised the coach cannot also be a leader or guide at the final destination.

j. The above points are made as a guide for organised trips only.

ATTENDANCE OF CHILDREN AND DOGS AT U3A ACTIVITIES

- Dogs; U3A members are permitted to take dogs on events such as walks and incidents involving them will be covered by U3A insurance.
- Children; Children or grandchildren of members may be permitted to attend certain U3A Group events, providing the event and venue are suitable for children, with the prior consent of the Group Leader. The child/children will be the responsibility of the member taking them.

Insurance:

Bourne U3A is covered by the Third Age Trust for insurance against accidents or claims arising from group activities whether they be claims against members, groups or branch, as long as due care has been taken.

GUIDANCE ON DEALING WITH PROBLEMS WITH GROUP MEMBERS

- Group Leaders **MUST NOT** deal with "problem" members on their own.
- Any issue related to discipline, incompatibility or discord in any group that has been caused by an individual should be immediately discussed with the Group Coordinator or Chairman for their guidance.
- A Group Leader should not become involved in written arguments in any form with another U3A member under any circumstances. This includes letters, emails, or any form of social media.
- This procedure would allow the Trustees to ensure a consistent approach to all disciplinary issues and would remove the very likely chance that words written possibly in haste and/or anger do not further complicate the issue in question.