

Harborough Welland u3a (Hwu3a)

u3a Group Coordinators' HANDBOOK

For Existing Groups and the Creation of New Interest Groups

This handbook is intended to be used as a reference for coordinators of established groups or for Group Coordinators who have just taken over running such a group, and for new Group Coordinators setting up their first interest group. The HWu3a Committee would like to thank you for your support in volunteering to run a group.

Index

Topic	Page
Introduction - the ethos of u3a	2
Third Age Principles - self-help learning, inclusivity, mutual aid	2
Forming a New Group - group aims, meeting arrangements, costs	2-3
The First Meeting (Recommended Steps) - shared learning/participation, skills, group roles, communication	4
Running your Established Group - managing membership, publicising activities, data protection	5-6
Field Trips - planning/managing trips, costings, participants	6
Holidays - booking, payments, participants	6
Full Groups and Waiting Lists - managing/updating lists, developing new Groups	7
Policies and Procedures - website documents	7-8
Financial Matters (Venues and Paying Rents) - Premises & Accessibility Officer, support with venues, payment methods	8
Finance Matters (General) - Treasurer, payment methods, group expenses, bank Accounts	8-9
Available Equipment - borrowing & purchasing equipment	9
Accidents and Incidents - reporting procedures	9
Problem Solving - resolving issues	10
Issues between Group Members - facilitating discussion, resolving disputes	10
Group Coordinators' Workshops - why and how often they are held	10
Help & Support (local, regional & national) - Committee, Beacon, online sources, social media	10-11

Introduction

It is often said that the interest groups are the lifeblood of the u3a and each group will develop its own structure. However, it is important that the group follows the u3a ethos of shared participative and self-help learning. **'The teachers learn and the learners teach'**. This results not only in an increase in knowledge, but also in a supportive, enjoyable and friendly atmosphere that enables everyone to participate. The u3a ethos is based on three principles:

The Third Age Principle:

- Membership of the HWu3a is open to all in their third age, which is defined not by a particular age but by a period in life in which full time employment has ceased.
- Members promote the values of lifelong learning and positive attributes of belonging to the HWu3a.
- Members should do all they can to ensure anyone wanting to join the HWu3a may do so.

Self-help Learning Principle:

- Learning is by the members, for the members.
- Members form interest groups covering as wide a range of topics and activities as they desire.
- No qualifications are sought or offered. Learning is for its own sake with enjoyment being the prime motive, not qualifications or awards.
- There are no distinctions between the learners and the teachers. They are all HWu3a members.

The Mutual Aid Principle:

- The HWu3a 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 HWu3a, other than to reimburse them in respect of reasonable expenses incurred.
- The HWu3a 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 HWu3a.

Forming a New Group - The Basics:

- Group Roles - If no one is already in place, agree on a Group Coordinator and a joint Coordinator or deputy and who will be responsible for the financial aspect of the group.
- Membership - Ensure that all prospective members of the group are members of the HWu3a.
- Group Name - Choose an appropriate name for the group that does not clash with any existing groups' names. Groups with similar names should be numbered or differentiated in some way, e.g. Crafting for Charities 2, Walking - Monday am.

- Meeting Times & Venues - Agree the development of the group, including when and where the group will run, with the Group Facilitator and/or the New Groups Facilitator, and any venue requirements with the Premises and Accessibility Officer. Include, if known, any accessibility needs that group members may have. This will ensure that the Premises and Accessibility Officer can arrange for a suitable venue, they will also arrange the invoicing of the venue costs directly from the venue to HWu3a – premises@hwu3a.org.uk
- Financial Support - If financial help is required for starting up a new group, e.g. for equipment or paying the first few venue hire fees, speak to the Group Facilitator who will make a request at the next Committee meeting for a small start-up sum - groups@hwu3a.org.uk
- Sharing Expertise – It is advisable for a new Group Coordinator, along with the Group Facilitator, to contact leaders of any existing groups in similar interest areas to discuss your intentions, both as a courtesy and to avoid duplication. In that way, you will be able to benefit from their expertise.
- Using Beacon - Arrange for the Group Facilitator or the New Groups Facilitator to enter the group's details on the Beacon membership database, after which time the appropriate access to Beacon for the Group Coordinator and any deputy will be authorised. The Beacon Administrator will send you a log on and temporary password, plus local contact details. (Using Beacon – training can be given by contacting the Group Facilitator. We advised Group Coordinators have a generic email address for the group to avoid having to use a personal address. It is also then easy to transfer to a new Coordinator. See Help and Support at the end of this handbook). Once your group or trip is active you must inform our treasurer treasurer@hwu3a.org.uk
- Beacon training can be arranged via Groups Facilitator – groups@hwu3a.org.uk
- Group Objectives - Consider what the aims of the group are – what are you hoping to learn/achieve/share? It would be useful, when agreed by the group, to write down these aims and later add them to the Information box in your group details on Beacon. The same wording will be needed for the group entry on the HWu3a website and should be kept updated.
- Publicising your Group - Generate interest by promoting your group using as many different methods as possible. This could include either giving a short talk or having a display table at the monthly 'Harborough Welland Get Together, advertising it on the Groups' Noticeboard via the Group Facilitator, in the HWu3a magazine or on the website and talking to members in groups that you attend. Another effective way of advertising your group would be to ask the Group Facilitator to email the membership to generate interest. The more methods you use, the more successful you are likely to be in creating a thriving group.
- Running Costs - The group members will need to be aware of the potential costs involved in creating the group. They will need to cover all the costs of the meetings or activities including, where appropriate, room hire, facility hire, any stationery/printing and any other supporting materials.
- Hybrid Meetings - If you are running hybrid meetings, where members can either attend the meeting in person or join it on Zoom, all members must pay the same to cover rental and Zoom costs.
- Collecting meeting costs from group members - Group Coordinators should agree and collect sufficient subscriptions for the operation of the group for every meeting, in advance. It is recommended the subscriptions be paid into the Hwu3a bank account, either directly by the individual or if cash is collected, this should be paid into the Hwu3a bank account. Please contact the Treasurer treasurer@hwu3a.org.uk for details. It should be arranged that the venue costs are invoiced directly to Hwu3a and the

Treasurer will make payments to the venues (see Meeting Times & Venues). The practice for all HWu3a Group Coordinators is to collect the agreed sum from members whether they are present or not and to reserve the right to review the subscription should there be any increase in costs to the group. It is important to establish this at the outset to avoid any embarrassment and to ensure that no one is out of pocket.

- Groups meeting in a house - It is suggested that each member pays the host an agreed amount per session to cover the cost of any refreshments provided.
- Risk Assessment - All Group Coordinators are expected to complete a Risk Assessment form in advance of meeting up for the first time. Venues may also ask you to fill in a form provided by them. You will find the risk assessment forms on the website. When completed, it should be sent to the Premises and Accessibility Officer - premises@hwu3a.org.uk
- Generic email addresses – Group Coordinators are encouraged to have a generic email address as it can be easily transferred to a new Group Coordinator, e.g. frenchimprovers@hwu3a.org.uk. Contact the Webmaster for help to set it up – website@hwu3a.org.uk

The First Meeting - Recommended Steps:

- Aims of the Group - The purpose of the group as the organisers of the meeting see it.
- Skills/Expertise - Ask about the skills within the group and discover the expertise within your group.
- Shared Learning - It is important to find out what knowledge and experience exists in your group and decide how these are going to be used. Shared learning does not mean that a group cannot seek to extend its learning base by inviting other members to join them, either permanently or for a specific purpose. There is a large body of research into later life learning that suggests that people in their third age learn best when they are in control of their own learning.
- Shared Participation - Participation by all group members should always be encouraged.
- Role-sharing - Agree the tasks that need to be undertaken to run the group successfully and who is willing to support these tasks, e.g. manage the group list on Beacon, help with the programme, keep the register, collect money, etc.
- Ability Level - Agree, if relevant, the level that the group will be aimed at beginners, improvers or advanced.
- Format of Meetings - Agree how the group will work – discussion, instruction, presentation, etc.
- Communicating with Group Members - Discuss how Group Coordinators will communicate with their members, bearing in mind data protection concerns and that **all email communication must be undertaken using Beacon.**
- WhatsApp - Group Coordinators may set up a WhatsApp group for members as long as they each give permission to share their phone number.
- Agree some ground rules, such as :
 - be punctual
 - listen to each other
 - allow others to speak
 - agree to disagree amicably
 - be respectful to other group members
 - every contribution matters
 - have patience with and encourage those who are slower to learn

Running your group once established:

- Where and When you Meet - Inform your group of the times and locations of your meetings and ensure they have all been made aware if any changes become necessary.
- Updating Group Lists - Ensure that the list of members on Beacon is kept up to date and inform the Membership Secretary if there are changes to any of the members' details or situation - membership@hwu3a.org.uk
- Sending emails - Beacon should be the only source for emails sent to the members of the group and others within the HWu3a.
- Generic email address – see Forming a New Group
- Publicising Group Activities - Advise the Editor and Webmaster monthly of your group's activities, so that these can be included in the magazine and website - newsletter@hwu3a.org.uk website@hwu3a.org.uk
- Posting on the Website - Group Coordinators are encouraged to have access to the HWu3a website to post news items and photos regularly. As the website is the main focus for new and potential members, group information will have more impact if it is up to date. Ask the Group Facilitator if you need a short training session on using Wordpress.
- Photographs - If you wish to publish photographs of group members on the website or in the magazine, please ensure you have their permission first or ask them to step aside while the photo is being taken.
- Copyright - When publishing pictures from other sources, always check that they are copyright-free; you can source these on a website such as <https://pixabay.com>
- Group Register - You should retain a register of your members' names for each of the meetings using, where possible, a sample Group Register which is available to download from the HWu3a website (About Us, Policies and Other Documents) or you can access the members' names on Beacon. Personal data concerning your group members must not be retained on any database or personal computer or other device other than on Beacon, except for this register.
- Protecting Members' Data - All group members' data must be kept securely, using sensible precautions and should never be disclosed to anyone outside the HWu3a.
- Group Coordinators' Contact Details - The Group Coordinator's permission should be asked before publishing their contact details on the website or in the monthly magazine.
- Data Protection - Group Coordinators will only be able to view names, phone numbers and emergency contact details on Beacon. It is essential that Group Coordinators' passwords are kept securely and secret from others and you should ensure that your computer is free of viruses and other malware which might enable unauthorised access to Beacon. The Group Coordinator should not allow any other person to use or have access to their Beacon account. In particular, a shared device must not be used to access a Beacon System account unless the user has a personal log-on for the shared computer. Access to Beacon via a public computer, e.g. in a public library, is strictly prohibited. The HWu3a Committee will promptly notify the Third Age Trust in writing of each Personal Data breach of which you become aware. The Committee has a designated Data Protection Officer to deal with issues arising.
- Checking Membership - Consult Beacon to ensure everyone attending is a member and always check for the membership details when someone new arrives.
- Prospective Members - Potential members may try out a group for up to two meetings free of charge.
- New Members - Encourage new members to HWu3a to attend the monthly HWu3a Get Together on the 4th Monday of each month, where they will receive a warm welcome, meet other new members and find out more about the u3a movement.

- Volunteers - Encourage your group members to sign up for STARS (Special Tasks and Resources). Volunteering can be a good way to meet others and feel more involved – stars@hwu3a.org.uk
- Non-Attendance - You should expect members to inform you if they will not be able to attend any meeting or event or if they can no longer attend the group.
- Keeping in Touch with Non-Attendees - Contact any members who have not attended for some time. There may be a valid reason and the intention is to come back when possible but, if not, they may be preventing another member from joining the group.
- Group Limits - Group Coordinators may need to limit the number of group members and, when this limit is reached, a waiting list will need to be set up on Beacon. (Please consult the section on 'Full Groups and Waiting Lists' to find out how to manage this situation)

Field Trips:

For outings away from the group's normal meeting place as an extension of a group's study activity:

- Planning a Trip - Always check with the Trip Coordinator that the date, subject or location does not clash with any other trips scheduled or in the pipeline. The Trip Coordinator can also give advice on the costing of trips that meet HWu3a guidelines - trips1@hwu3a.org.uk
- Managing a Trip - The Trip Coordinator will also set up a new 'group' for the trip on Beacon to which the names of the members' attending should be added. This provides us with a back up for auditing purposes and for health and safety should there be an incident and contact details are required.
- Emergency Contact Details - Group Coordinators should print off a list of members attending, including emergency contact details; any other details should be added in Notes and these can all be downloaded on Beacon. Some members may prefer an emergency contact on the landing page of their smartphone.
- Costing a Trip - The total cost of the trip must be shared equally between those participating, including the Group Coordinator.
- Financing a Trip - Any financial arrangements for a trip, must pass through and be agreed by the Treasurer. (See Financial Matters - General) Where possible an invoice for the trip costs should be sent directly to the Treasurer from the supplier for payment.
- Refunds - Trip organisers will make every effort to fill vacancies arising from members' cancellations, but refunds cannot be guaranteed in respect of monies paid over. A refund can only be made if recovery is obtained by the organiser from the venue.
- Trip Participants - Trips are normally open to members of the group and can only be offered to other HWu3a members when it is necessary to fill a coach.
- Non-Member Participants - Members may be accompanied by a non-member acting in a caring capacity and the necessary arrangements must be in place before booking. The Trips Group Coordinator must be advised in advance for insurance purposes.

Holidays:

- Booking a Holiday - If agreed with the Holidays Group Coordinator, the holiday must be booked through a registered, insured, licensed and reputable agent (e.g. a travel agent, tour company or coach company) and the liability for the fulfilment of the holiday must rest with the agent. This must also be made clear in any publicity materials.

- Bookings & Payments - Ensure that all bookings and payments are arranged directly between the member and the agent. HWu3a is not to be involved in any financial transaction. No monies can be collected by the Group Coordinator or HWu3a.
- Holiday Participants - Holidays are open to members of the Holiday Group and can only be offered to other HWu3a members when it is necessary to fill a coach. If a member requires to be accompanied by a carer, they have to make the travel company and Holidays Group Coordinator aware of their needs.

Full Groups and Waiting lists:

The number of members in a group may occasionally have to be limited for various reasons, e.g. the nature of the activity, health and safety, etc. and, if the demand exceeds the maximum number, then it becomes necessary to operate a waiting list.

If your activity group is full, you must contact the Group Facilitator and/or the New Groups Facilitator and also ensure that you take the details of any members who wish to join your group. These members should be recorded on your group's waiting list on Beacon. They can either join your group later if a place becomes available, or a new group with a new leader can be formed to meet the demand. It also enables the Group Facilitator and New Groups Facilitator to work proactively on initiating new groups when a waiting list of several interested members is available on Beacon - groups@hwu3a.org.uk

It is important to help members by following this process. **Please do not just tell them that your group is full.**

Although there is no wish to implement an attendance requirement as such, Group Coordinators should check their membership list regularly to ascertain if all members still wish to continue attending, especially if there is a waiting list. There is an obligation on all members to inform the Group Coordinator if they wish to cease participation in their activity or, if for sound reasons, e.g. health related, they need to suspend their involvement. It is the responsibility of the Group Coordinator to make contact with any such member to clarify their involvement, take into account any valid reason for non-attendance and use discretion before removing a member from the Beacon list.

Policies and procedures:

To comply with current legislation and the requirements of the Charity Commission, we have created a number of policies and procedures on data protection and on our obligations to our members. The point of contact on the Committee is the Secretary - secretary@hwu3a.org.uk

Contacts for all Committee Members are on our website: <https://hwu3a.org.uk> Go to the About Us tab and select Committee Roles. Details are also in monthly Magazine.

The documents can be found on our website: <https://hwu3a.org.uk> Go to the About Us tab and select Policies and other documents:

- HWu3a Constitution
- Data Protection
- Privacy
- Safeguarding
- Complaints

- Grievance
- Disciplinary
- Equality and Diversity
- u3a Member Code of Conduct
- Finance Policy (effective from January each year)

Other useful documents (check regularly, too, for updates):

- Incident Report Form
- An Overview of the u3a Insurance Cover
- The Principles of the u3a Movement
- Group Coordinator Beacon Guide
- HWu3a Register or notes on how to do this using Beacon
- Venue Hire Terms
- Rental Payments Slip

Please take the time to familiarise yourself with them.

Financial Matters - Venues and Paying Rents:

- Problems or Changes Relating to the Venue - Please contact the Premises and Accessibility Officer with full details and they will endeavour to resolve it as quickly as possible - premises@hwu3a.org.uk
- Collecting Rent Money from Large Groups - Leaders of larger groups can be provided with an iZettle device which takes contactless payments and requires that the payee has a smartphone. Training on the use of an iZettle machine is available - please contact the Membership Secretary - membership@hwu3a.org.uk
- Monies Collected for Room Hire, Group Visits or Other Activities - These can be paid by bank transfer and an email must be sent to: premises@hwu3a.org.uk and treasurer@hwu3a.org.uk . If paid directly to the Premises & Accessibility Officer, a completed Rental Payments Slip must be included for each separate group payment (ask for hard copies or download from our website).
- Frequency of paying in rent – Whilst it is recognised that groups meet at different frequencies and collect payments for group expenses at varying times of the year, Group Coordinators are expected to pay in any monies collected for rent as it is received. Your ongoing help with this will be greatly appreciated by the relevant Committee volunteers!

Financial matters - General:

As a Charity, we are required to follow sound financial practices. There is a Financial Policy in place (available on the website: <https://hwu3a.org.uk>) and this will be reviewed annually. Therefore, the following recommendations on bookings and money handling are to assist you:

- Annual Financial Report form - As the HWu3a Committee is jointly responsible for keeping full financial records of the overall u3a and the groups within, all groups which deal with money must complete an AFR form at the end of the calendar year. This ensures that financial statements prepared by the Treasurer will include all transactions of the Group and thereby that both income and expenditure are accurately recorded and reported both to the members and the Charity Commission. This information should also be shared with group members so that

they are aware of what happens to their money. Groups which have no finances, e.g. walking groups, should email the Treasurer to confirm a nil return. Non-u3a income does not need to be reported because it doesn't qualify to be incorporated in the accounts, e.g. members' contributions towards a Christmas meal.

- Financial Records - all records, including invoices and receipts, need to be kept for 6 years.
- Group Expenses - We do not wish or expect a Group Coordinator to be out of pocket, therefore expenses, e.g. rent or photocopying, must be shared among the group.
- Payments by bank transfer - This is the preferred method of payment for all activities as cheque payments now incur bank charges. Please contact the Treasurer or an Officer for the bank details. When paying using this method, please make it clear on the reference what the payment is for and also email the Treasurer so that it can be picked up when reconciling the bank statement - treasurer@hwu3a.org.uk Invoices or receipts are required for all transactions. Training on iZettle can be arranged via the Treasurer
- Retaining Small Cash Amounts - The Group Coordinator should retain no monies, other than to cover the small running expenses of the group. Any cash retained in this way should be clearly labelled so that it can be identified as money belonging to HWu3a.
- Bank Accounts - No group may open its own bank account.
- Use of Personal Bank Accounts - Only pay members' money into your own personal account when you need to do a bank transfer, e.g. for paying rent into the HWu3a current account.
- Personal Payments - Do not pay for others, room hire or any event using your own money.
- External Speakers for Larger Groups - For providing one-off talks at an interest group, speakers may be paid a fee and/or expenses. This must be budgeted for in the annual subscription for the group and bank details need to be provided for the Treasurer. If this is for an unplanned event, please consult the Group Facilitator or Treasurer for help with paying a reasonable fee from central HWu3a funds.
- Paid Tutors - It is not u3a practice to use paid tutors on a regular basis, in accordance with Third Age Trust guidelines.
- Planning a Group Trip - Please involve the Treasurer at all stages of the booking process with details of the costs. The Treasurer is always willing to answer questions on any financial transactions - treasurer@hwu3a.org.uk

Available equipment:

- Borrowing Equipment - HWu3a has equipment which you can borrow such as a digital projector, screen and laptop, etc. Please contact the designated HWu3a member or email: marketing@hwu3a.org.uk
- Additional equipment - if your group needs additional equipment which they would like HWu3a to fund, please contact the Group Facilitator with projected costs, and this will be put to the Committee: groups@hwu3a.org.uk
- PAT testing – ALL electrical equipment used by Groups, whether personal or owned by Hwu3a, must be tested annually by a qualified person at a designated session. It is incumbent on the Group Coordinator to ensure that this is carried out.

Accident and incidents:

Report any accidents or incidents to the Group Facilitator as soon as possible and complete the Incident Report Form which can be found on the website. The completed form should then be passed on to the Secretary.

Problem solving:

Sometimes issues can arise within a group which 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 Facilitator if you are unsure how to resolve the problem or just want someone with whom to explore options.

Issues between group members:

Where there is potential for friction it is advisable to begin by bringing it into the open. Either you or another person could try to facilitate a discussion either with the members concerned or with the whole group, but it is important that the facilitator remains neutral and non-judgemental. If you cannot reach a resolution informally, speak to your Group Facilitator. If a situation does not resolve itself and becomes acrimonious, the designated Complaints Officer will follow the correct policy procedures with a view to reaching a satisfactory outcome. There are also trained Trust volunteers who offer support with resolving disputes.

Group Coordinators' Workshops:

Periodically we run workshops in different formats where you can meet Committee members and network with other Group Coordinators, as well as keep up to date with everything that is happening in HWu3a. We do hope you will be able to join us.

Help and Support (local, regional and national):

Committee Members – contact details for all are on our website: <https://hwu3a.org.uk> Go to the About Us tab and select Committee Roles. Details are also in each monthly magazine.

Beacon – The main administrator is Ian Webb – beacon@hwu3a.org.uk assisted by Helen Salisbury helensalisburyslu3a@gmail.com & Stephen Joy website@hwu3a.org.uk

Beacon Online Help - When landing on the homepage for Harborough Welland u3a, go to the foot of the page where there are links to the **Beacon Users' Guide** and you will be taken to the **Beacon Help Centre**. Click on the **User Guide** for simple to follow instructions and screenshots to help you.

Sources Online: The u3a educational publication which provides ideas to enhance learning. Click on the link to view these.

Subject Advisers: Trust volunteers with specialist knowledge in a wide range of topics. Contact details on the national website and in Third Age Matters. Again, click on the link to obtain the contact details.

External Organisations: Museums, libraries, schools, universities

u3a Publications: Check the national website for the latest publications:

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

Online Learning Workshops: encourage members to visit the page and enrol for workshops:

<https://www.u3a.org.uk/events/educational-events>

Networks, Regions, Neighbouring u3as: allow you to draw on experience from within the movement: <https://u3asites.org.uk>

Regional Trustee: will provide an oversight of the region and a link to National Office:

<https://www.u3a.org.uk/regional-u3a-websites>

National Office: the staff team are available Monday to Friday to offer support:

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

Newsletter - monthly electronic: u3a updates, both regional and national, direct to your email inbox. Subscribe online: <https://www.u3a.org.uk/email>

Facebook – check out pages for the Harborough Welland u3a, national u3a ‘Keeping in Touch’, u3a craft groups, and National u3a week. Click on the link to access these.