

Comber and District u3a.

A Handbook for Leaders.



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1. Introduction

First of all, a big “Thank You” to all our Group Leaders. Interest/Activity Groups are at the heart of the shared learning ethos of the U3A, and we can’t offer these opportunities without you all. We really appreciate your contribution.

This Handbook is provided to help you in your role and to provide a checklist for those who are thinking of proposing a new Group. As a registered Charity, (Charity number 103359), we are bound to ensure that we operate within all relevant legislation and some key considerations are outlined below. One particular development was the introduction in May 2018 of the General Data Protection Regulation (GDPR), which is designed to ensure that organisations collect only the personal data they require; use it appropriately and store it securely; this is elaborated on below. Throughout the Handbook the term ‘Group Leader’ is used generically for all those involved in organising groups, whether as a convenor, coordinator, facilitator or tutor.

Remember the Group Co-ordinators are there to support you, please keep them and the Website Manager up-to-date with information about the arrangements for, and activities of your Group. We have an excellent website and we need to continue to encourage members to use it as their main source of information.

Webmaster webmaster.u3a.comber@gmail.com

Website www.u3auk.com/comber

2. Ethos

All u3a’s are based on the belief that sharing learning is both effective and suitable for those in the third stage of life, no longer in full time employment, and who wish to continue learning. Self-help is central to all we do so please try to encourage all your Group members to play an active role. It should not all fall to you as Group Leader.

3. Equal Opportunities.

All u3a's pursue an equal opportunities 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
- gender (including gender reassignment)
- marital status (including civil partnership status)
- sexual orientation
- race or racial group (including colour, nationality and ethnic or national origins)
- religion or belief
- disability
- social status

All u3a's strive to achieve a membership which reflects the composition of the community they serve. They are committed to the furtherance of fair treatment and the absence of discrimination in all activities, contact and communication with external organisations, and members of the general public.

4. Accessibility

Remember that accessibility is an important consideration for our target audience and bear this in mind when considering venue and method of delivery.

5. Safeguarding

This is a term with which we are all becoming increasingly familiar. Essentially it means that everyone has a fundamental right to feel safe. Safeguarding is everyone's responsibility and, as adults, we should all strive to prevent harm be it from abuse, neglect or exploitation. The committee will be addressing the need for a specific safeguarding policy, which will be published on the website.

6. u3a Members and Companions/Carers

Should the situation arise that a member no longer feels confident that they can participate fully without needing help, it will be necessary for that person to be accompanied by a companion/carer who will be covered by the Liability Insurance provided by the Third Age Trust, whilst in attendance. Even if you have members who are willing to help, you cannot

allow them to take responsibility for another member's care, as this could be deemed to be outside our insurance cover if any injury or damage resulted.

7. Personal Data.

Our Data Protection Policy is published on our website. Essentially, we must ensure that we:

- Acquire members' consent for the use of their personal data for u3a purposes only.
- Gather only the data which is required. * Keep the data accurate and secure.

As Group Leaders you get consent to the use of personal data when members sign up for a Group and provide name and contact details. You need to ensure that your lists are accurate by updating membership lists annually. You also need to keep it secure and we therefore ask that you blind copy lists (using the *bcc option* on the e-mail header) when sending out information to members. Do not share the personal data with a third party unless this has been agreed when the data is provided, e.g. to a tour company for holiday arrangements. We also ask that you maximise the use of the internet to convey Group information.

Please be aware that photographs are classed as personal data. If Group photographs are planned please advise those who don't give consent to being included to step out of the photo and ensure that everyone involved knows where it will be displayed.

8. Insurance.

Group activities are covered by Public & Products Liability Insurance. This covers u3a members for loss due to accidental injury to a person or accidental loss or damage to property not belonging to them, as long as it arises from or in connection with a u3a activity. Should you ever experience such a situation, please contact the Secretary for advice. Also complete an Accident Report Form, shown in Annex 1 and available on this web-link;

<https://u3a.org.uk/advice/insurance-and-safety/338-incident-report-form>

Details of the insurance policy:

Public & Products Liability, Aviva Insurance Limited - policy number 24988677cci.

i. Further Considerations

If you are responsible for selecting a suitable venue you may find it useful to consult the risk assessment checklist and “Advice Sheet 1: Accessibility for Disabled Members”, available from the National Office website.

- You should not sign any formal rental agreement yourself – please pass it to your Groups Coordinator(s) for the Committee to deal with.
- You need to maintain an attendance register.
- When you arrive at the session venue, do make sure 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.

ii. Membership

- Ask your members to provide you with contact details, i.e., telephone numbers/email addresses. It may also be appropriate to ask for an emergency contact. (See Data Protection considerations above)
- Ensure everybody attending is a member of Comber and District u3a and always check when anyone new arrives. (A member of a u3a may join one Group in a neighbouring u3a, but if they plan to join more than one Group then they must become a member of that u3a.)
- Non-members are allowed to attend one session as a visitor. Any further attendance requires full membership of the Comber and District u3a.
- If a member stops attending, please try to find out why.

iii. Visitors

While we are very happy to encourage potential members to come along and sample what we have to offer, non-members cannot attend our events regularly, as this could invalidate the Liability Insurance provided by the Third Age Trust.

As a rule of thumb, we allow non-members to come along to one monthly meeting and one meeting of any one Group. In exceptional circumstances a case may be made to the Committee for an additional attendance.

iv. Carers.

An exception to the above is where a member is no longer able to continue to participate fully without the help of a carer. While a carer is in attendance they will be covered by the Liability Insurance provided by the Third Age Trust. However, if the person is a professionally employed carer, they must be covered by their own individual liability insurance policy.

Where a member wishes to be accompanied by a carer they must provide the Committee with the carer's details in advance.

9. Group Financing and Reporting.

Groups must operate on a self-financing basis. Trustees, (Committee Members), are ultimately responsible for the proper handling of all Group Income and Expenditure and therefore the following points must be observed:

- Maintain and keep adequate records for Group income and payments.
- Report as regularly to your Treasurer as you are required to do so.
- Group session income should only be used to cover expenses such as:
 - room hire/leader's expenses
 - consumables/refreshments
 - occasional guest speakers.

Groups should not

- open bank accounts for Group operational expenses.
- use personal bank accounts for Group activities.
- keep excess cash at home.

Consult the Treasurer for advice before using your own credit/debit card to pay for any part of Group events.

Groups meeting in members' homes need to agree their own operational arrangements, with members contributing to cover refreshments etc.

10. Equipment.

Laptops, projection equipment, sewing machine, a printer and other associated equipment is available for Group use. Primarily, the equipment will be used for providing learning opportunities to members or information presentations by members of the Committee or by Group Leaders.

Committee Members/Group Leaders are responsible for completing the Equipment Movement Sheet, which is kept in the storage cupboard, when equipment is used off the storage site. It is the responsibility of the appropriate Committee Member/Group Leader to ensure the equipment is returned. Insurance cover is in place for the equipment stored, including home storage, transport in vehicles, and the authorised use of equipment on third party premises.

Inappropriate use of the Internet or e-mail is not allowed.

11. Starting an Interest Group.

Anyone wishing to start an Interest Group should talk to the Groups' Coordinator. If a decision to go ahead is made, the information can be announced at a Monthly Meeting.

Anyone interested in the proposed Group is asked to sign their names on a list and then an inaugural meeting is held to discuss how the Group could function and be organised. A Leader for the Group may arise prior to, or at, the meeting. The Groups' Coordinator or another Committee Member can help to seek out a suitable person/s to lead and then give support.

Preparation - The Groups' Coordinator(s) would appreciate the following information:

- Brief synopsis of the aims of the Interest Group and the main activities proposed.
- Assessment of the potential Group membership numbers and accommodation requirements
- Assessment of initial set-up costs and support requirements.
- Assessment of any on-going support requirements.
- Arrangements for financial accounting and reporting.

The Groups' Coordinator will discuss this information with committee members at the next committee meeting.

12. Planning for a New Group.

Prepare for the first meeting - You will need to decide your purpose, find out the skills and resources at your disposal, and then decide on a method and the level at which the Group will work (beginners, improvers, advanced). Consideration should be made on the frequency of meetings, the time of day and length of the meeting and a suitable venue.

You will need to consider the size of the Group and its needs; e.g. type of chairs, tables, screens, equipment etc. Room hire expenses for new Group inaugural meetings will be met from Comber and District u3a funds. The Groups Coordinator will be able to advise you on what local venues have been effectively used by other Groups, as well as providing contact details and costs. Please note that we have access to a discount for use of Council premises because we are a charity.

It is useful to have a handout for the first meeting in the form of a check-list. In order to share learning, it is important to find out what knowledge and experience exists in the Group. This focuses the Group and encourages shared responsibility. A successful Group will be clear about and share expectations

As the potential 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 will get tired and the Group will suffer. The ethos of U3A is that its members share their knowledge and experience freely, but there may be times when a paid external speaker would be appropriate.

Paid external tutors may only be used where there is a justified health and safety consideration; e.g. where a professionally qualified tutor is needed for Yoga or Pilates. Such a tutor must be able to provide evidence of their qualifications and demonstrate that they have the appropriate public liability insurance. Any Leader thinking of engaging a paid tutor who meets these requirements must first get Committee approval.

Talk to your Groups' Coordinator(s). There may be local help and there may be opportunities to meet with other u3a's to share experience and resources. 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.

13. Shared Learning Projects.

A typical Shared Learning Project involves u3a members working with a local institution, such as a gallery or museum, on a project of mutual benefit. These co-operative ventures offer an exciting opportunity for sharing expertise and learning.

The Third Age Trust website describes what shared learning projects are and how to start one. There are also regular reports of such projects in Sources.

14. Guidelines for Car Sharing

The purpose of this guideline is to ensure that any reimbursements to member drivers who have agreed to use their own car and are willing to accommodate other members as passengers when attending social events, Group field trips or Group outdoor activities, are handled in a fair and consistent manner.

The basis of reimbursement is that the notional cost of fuel should be shared equally between the occupants of the car including the driver. This principle could also be applied to any parking charges and vehicular entrance charges.

Suggested car sharing rate would be £2 for short journeys and £3 for longer ones, unless a specific amount is required for a particular journey.

15. Additional Information

u3a Trust – www.u3a.org.uk

Insurance - Public and Products Liability Insurance, Insurance Overview web site
www.u3a.org.uk/advice/insurance-and-safety/217-public-and-products-liability-insurance-faqs

www.u3a.org.uk/advice/insurance-and-safety/216-insurance-overview

Phone – National Office & Resource Centre - 020 8466 6139

Northern Ireland u3a - web site www.u3ani.info/

Annex 1

Accident Report.

Group

Name of injured party/contact details.	
Name/Contact details of others involved.	
Date/ Time of accident.	Location.
Nature of accident/Circumstances.	
Injury details/Property damage.	
Names, contact details of persons causing injury or property damage.	
Witness/Contact details.	
Action taken.	
Details of specialised assistance needed at scene.	
Details of subsequent medical attention, if needed.	
Group Leader (print)	Telephone
Signed (injured party)	
Signed (Group Leader)	Date.

Continue on a separate page, if necessary.