

# Stourbridge u3a Group Leaders Handbook July 2024

**'Providing opportunities to share learning experiences and activities in a wide range of interest groups'**



**u3a**  
learn, laugh, live

## Contents

Page 2	Index
Page 3	Group Leader's Role
Page 4	Setting up a Group
Page 5	Members Funding Group Expenditure
Page 6	Safety Safeguarding
Page 7	U3A Asset Register PAT Testing Resources
Page 8	Inclusion Equality Diversity & Inclusion Running the Group
Page 9	Running the Group (cont.)
Page 10	Copyright Insurance
Page 11	Using the U3A Trust Website Site Builder
Page 12	Useful Contact Details
Page 13	Appendix 1 Venue Checklist
Page 14	Appendix 2 Walking Group Checklist
Page 15	Appendix 3 Physical Activity Checklist
Page 16	Appendix 4 Cycling Leader Checklist
Page 17	Appendix 5 Accident / Incident Report Form
Page 18	Appendix 6 Request for Expenditure over £50

There is no one single blueprint for running a group. It is up to the group itself to establish how best it should operate. If you are in need of help or assistance In the first instance talk to the Group Liaison Officer who will help, as far as possible, or put you in touch with other members who can offer advice.

### The Group Leader's Role

- Maintain a register of members and monies taken.
- Record attendance by non-members and forward these to the membership secretary.
- Periodically check group list against member list supplied by the membership secretary.
- Pay money into the u3a account regularly, either directly or via the Treasurer, but no longer than quarterly.
- Provide a programme of material for the group which can be by negotiation with other members.
- Warn any members of cancellations.
- Inform Accommodation Officer of any planned non-use of premises.
- Check the risk assessment for the activity and warn members of any potential risks.
- Check the safety of the venue before each meeting and take necessary action.
- Record any accidents and forward details to the Group Liaison Officer who will ensure that the Chair and Business Secretary are informed.

## Setting up a group

Any member wishing to start a group should liaise with the Group Liaison Officer who will raise the idea with the Committee. If the group idea is agreed the Accommodation Officer will suggest suitable premises. Setting a time and date for the group will be by consultation, looking at the spread of activities over each week. The group should be advertised on the quarterly newsletter, on the noticeboard at the monthly meeting, and by a verbal notice by the Chair at the monthly meeting.

In each group there will be one person who will take on the central role although it is possible that the role might be shared. It is one of the tenets of the u3a that group leaders are drawn from the membership. The role of the Group Leader is to guide a group through a course of study or activity in which they may, or may not, lead the activity. Most members prefer a democratic style of leadership. Responsibility is shared with the group and members will be invited to take an active part.

The Group Leader should keep control of the session in respect of timing and content.

At the first meeting the group members might find the following topics useful to progress:

- the range and nature of the subject to be studied
- the time scale, where and when to meet, length of session, organisation of group
- the resources available in the subject area.
- there is a variety of types of study and activity. Aim for a good mixture of them. Remember that the u3a does not give any qualification and members learn from each other at their own level.
- Group Leader Led: The Group Leader facilitates the planning of the learning or group activity. The Group Leader does not need a formal qualification in the subject area. Some familiarity is important. Enthusiasm is the key ingredient.
- Member Led: Here the members lead sessions. They can take turns in organising meetings, perhaps researching and introducing a topic to others.

- Paired/Team Led: A small group of members share the delivery and facilitate the study.

## Meetings

Most groups meet monthly but there is no reason why groups should not meet more frequently if members wish. Sometimes groups start small in members' homes. If a group takes place in a home the owner's personal home insurance is not invalidated.

## Members

We are a membership organisation and as such those attending the groups will be current members of Stourbridge u3a. We offer up to a total of 3 taster sessions for non-members to attend group sessions, monthly meetings and trips, **after which** they must join the membership if they wish to continue. All visitors are to pay £2 for each session they attend. This needs to be monitored by the person in each group who is responsible for dealing with the meeting fees and contact made with the individual about joining for attendance of the group, to continue. **It is essential therefore that details of non-membership attendance are sent to the Membership Secretary so they can be checked against the membership list.** Our u3a insurance is only valid if we apply this tight criterion.

## Funding

There are two options for funding groups:

1. Where the group meets in a venue hired by the u3a, the charge per session will be collected by Group Leaders and passed to the Treasurer.
2. Where the group meets in a member's home, the Group Leader will collect fees from group members but the host is entitled to retain 50p per member for use of facilities.

## Group Expenditure

Group leaders can deduct small payments (up to £10) from income without asking permission - this is intended to cover things like printing. Expenses of £10 - £50 need to be approved in advance by the

treasurer and group coordinator. Anything from £50 upwards needs prior committee approval – there is a designated form for this in the Appendix of this handbook.. All expenditure must be supported by a valid invoice/receipt

## Safety

The safety of members is paramount, the group leader must read the generic Risk Assessment for the type of activity (see Appendices at end) and ensure that everything possible is done to both warn members of potential risks and to ensure that members conduct themselves in a fashion that minimises risk of injury. It is useful for Group Leaders to have a copy of the accident form with them at each meeting.

## Safeguarding

### 1. What is safeguarding?

“Safeguarding” refers to measures designed to protect the health, wellbeing and human rights of individuals.

- All u3a members have a responsibility to report any safeguarding concerns to their committee.
- All u3a committee members have an obligation to follow their safeguarding policy and procedure if they suspect that a member is at risk of abuse.

### 2. What are some examples of where safeguarding procedures may be activated?

- A member controlling the finances of a visually impaired member.
- A member arriving at an outdoor-based group without appropriate clothing and seemingly confused.
- A member making advances towards another member with dementia.

### 3. What is the responsibility of members in safeguarding?

Safeguarding is everyone’s responsibility, and members must bring any safeguarding concerns they have to their committee (this can be via their group leader). Members should follow their code of conduct and not keep any concerns they have to themselves.

Group Leader Liaison is person to report to.

## U3A Asset Register

Not the most exciting subject but it is important that our u3a has an accurate record of all the equipment held by groups. We need to know where this is, particularly if group leaders change and it must be listed so that any damage or loss is covered by our insurance policy. We also need to know when electrical equipment is due for PAT testing, normally every three years.

The Asset Register should contain as much information on the equipment as possible including the manufacturer's serial number, where it is stored (by group leader or at a meeting venue) and when last PAT tested.

Some groups use equipment owned by one of their members and this cannot be included in the asset register as it is not covered by our insurance. However, we recommend that any electrical items are PAT tested, for which there is no charge to the owner, as this may be a requirement of the venue used by that group.

Please contact Ivor Caplan, [minutes.stourbridge3a@gmail.com](mailto:minutes.stourbridge3a@gmail.com) for any advice or to register any changes or new equipment. We will notify group leaders when PAT testing is due, usually carried out at a central venue to minimise cost.

## PAT Testing

Periodically, electrical equipment used at meetings and owned by u3a is checked for safety and tested. Details of the testing arrangement is distributed, and the Group Leader must ensure that equipment held by them is taken and collected. No equipment should be used that has missed the annual test.

## Resources

Where appropriate use the resources available from Third Age Trust. The Resource Centre can be contacted on telephone 0208 315 0199. email: [resource.centre@u3a.org.uk](mailto:resource.centre@u3a.org.uk)

The Resource Centre has a collection of material other than books available for all u3a groups to borrow, free of charge, except for the cost of return postage.

## Inclusion

No member should be denied access to groups on the grounds of disability or infirmity. Group Leaders should consider the access arrangements of venues to enable all interested members to participate. Any difficulties should be discussed with the Accommodation Officer. Group Leaders are asked to take reasonable steps to accommodate disabled members. Disabled members may be accompanied by a regular carer without charge.

## Equality, Diversity and Inclusion

When setting up a policy, there is a need to establish areas to be covered such as:

- Physical conditions, ethnicity, gender and sexual issues.
- Technology
- Current language usage: current terms used for physical conditions and people of colour and consider adopting gender-neutral vocabulary.
- Racial and cultural
- Range of interest groups to attract hard-to-reach communities
- Interest groups appropriate to potentially newly retired people
- Speakers from different cultures to attend monthly meetings

There is a presentation available on 'Attitudes and Bias Awareness' that could take place at a monthly meeting or to the committee.

See: <https://www.u3a.org.uk/advice/diversity-and-inclusion/guidelines-for-u3as>

## Running the Group

Group Leaders are responsible for notifying members of any changes to times, venue, change of content, or cancellation of sessions.

Keeping attendance records accurate and up to date is important so that they can be easily audited. A list of group members must be provided to the Membership Secretary on request.

Group size will be determined by the activity and venue, the Accommodation Officer should be consulted if a larger venue is necessary. If necessary, the Group Leader should maintain a waiting list.

Photocopying and printing costs will be reimbursed as reasonable.

Any resource purchased with group members' allocated funds is the property of Stourbridge u3a and does not solely belong to any particular group. There should be no unauthorised retention of funds to finance equipment or resources. This is particularly important for audit purposes.

Any group requiring materials or equipment should contact the Treasurer before committing to any expenditure. An inventory of equipment is held on the website to enable groups to share equipment.

It is not the policy of u3a to have paid tutors, members learn from each other, there are however limited exceptions:

- Where there is a Health & Safety risk where special skills are required.
- Where a site visit is planned and the venue makes a charge for the visit or to cover the cost of a warden or leader on site.
- In each of the above categories, the group members are expected to arrange among the group for the cost to be covered by a fair contribution by all group members.

Travel to or from the meeting venue is at the members' expense. Where private cars are used, it is environmentally responsible to car share. The members should be covered by the driver's insurance as it would be classed as social, domestic or pleasure.

Any outing arranged by the group must be by consultation with the Outings Policy and should be funded by the group.

If damage is caused to property by a group member, take full details as it may in future be the subject of an insurance claim.

Should the Group Leader have a difficult member, whose behaviour is regularly impacting on the other members of the group, assistance can be obtained from the Group Liaison Officer.

If the Group Leader has a serious problem in a session, it is quite acceptable to ask a member to leave but contact the Group Liaison Officer as soon as possible after the end of the session.

Reports of group activities are always welcomed by the Newsletter Editor.

### Copyright

Under UK copyright law, only an insubstantial amount of material can be photocopied for personal use for the purposes of private study or non-commercial research. The law does not define the word “insubstantial”. However the legal amounts are generally understood to be a chapter of a book, an entire article from a journal or 5% of a publication, whichever is the greater. One copy for personal use only may be taken without licence.

Stourbridge u3a holds a Copyright Licence for Adult and Community Learning (CLA Education Licence). This licence permits group members to make multiple copies of extracts 'from books, journals and periodicals within clearly defined limits'. These limits are the same as above: a chapter of a book, an entire article from a journal or 5% of a publication, whichever is the greater.

Please note that this licence does not cover the copying of printed music, newspapers, maps or charts. All these are subject to their own rules which must always be followed.

If in doubt, contact the Group Liaison Officer or a Committee member for advice.

### Insurance

If it is shown that a Group Leader is in any way responsible for personal injury or damage to property and legal liability can be proven, the Group Leader is fully covered by u3a Public Liability insurance. To ensure that our insurance policy is not invalidated the Group Leader must ensure that non-members are at meetings as taster sessions only as previously detailed.

The insurance policy is agreed with the Insurers on the basis that the various risk assessments will be used. The ‘Venue Risk Assessment’ would normally be carried out by the Accommodation Officer. They will point out any potential hazards which require attention. The Group Leader must ensure that each meeting is dynamically risk assessed to ensure that no changes have occurred that would affect a members

health and safety. If a meeting place is a member's home, potential risks should be taken into consideration, e.g., the presence of builders on a particular day. u3a insurance covers damage to the property of any u3a member whilst their home is being used to host a u3a interest group.

### Using the u3a Trust website

The website address is <http://www.u3a.org.uk/>

There is a variety of information and resources here which can be accessed by creating an account.

There is also a button to see the West Midlands region website.

### SiteWorks

This is where your group web page is displayed. Log in details are given to you by the Website Manager. Access via <https://stourbridge.u3asite.uk/wp-admin/> , select login and edit. Your page should give information about the group, where it meets and when, what people need to bring with them and any other information that a member would find useful. Pictures can be added to give a flavour of the activity although care should be taken that you have permission to show individuals and that you are not breaching copyright by taking material from the internet.

## Useful contact details:

Stourbridge U3A  
Committee details: 2024 / 2025

Stourbridge U3A Position	Name	Email address
Chair	Barbara French	<a href="mailto:chair23.stourbridgeu3a@gmail.com">chair23.stourbridgeu3a@gmail.com</a>
Vice Chair	Ivor Caplan	<a href="mailto:minutes.stourbridgeu3a@gmail.com">minutes.stourbridgeu3a@gmail.com</a>
Treasurer	Anne Williams	<a href="mailto:treasurer.stourbridgeu3a@gmail.com">treasurer.stourbridgeu3a@gmail.com</a>
Business Secretary	Trevor Hahn	<a href="mailto:businessec24.stourbridgeu3a@gmail.com">businessec24.stourbridgeu3a@gmail.com</a>
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Speaker Secretary	Sheila Bettison	<a href="mailto:speaker24.stourbridgeu3a@gmail.com">speaker24.stourbridgeu3a@gmail.com</a>
Assistant Treasurer	Mike Wells	<a href="mailto:treasurer2.stourbridgeu3a@gmail.com">treasurer2.stourbridgeu3a@gmail.com</a>

## Appendix 1 Venue Check List

U3A Name:			
Location:			
Date:			
Interest Group:			
Description:			
Person checking:			
Hazard	Yes	No	Comments
Is the access suitable for the group attending the activity?			
Is wheelchair access adequate?			
Is the area free from obstructions and trip hazards?			
Is adequate means of escape in an emergency provided?			
Are there appropriate direction signs to aid escape?			
Is there a Fire alarm			
Is there Emergency Lighting?			
Is there a designated assembly point? Where is it?			
Is there an emergency procedure for the building? Do you have a copy?			
Is seating always laid out?			
Is the kitchen adequate and hygienic for drink making?			
Are the toilet facilities adequate and accessible?			
Is equipment being brought to the venue?			
Has it been PAT tested?			
Is there a First Aid Box or is the U3A to provide this?			

Additional information:

## Appendix 2 Walking Group Checklist

U3A Name:	
Location:	
Distance:	
Terrain Type:	
Date:	
Person Responsible:	

Before walk: Information to participants:	
1	<ul style="list-style-type: none"> <li>a. Location</li> <li>b. Distance</li> <li>c. Timing</li> <li>d. Linear n/ circular Route</li> <li>e. Terrain</li> <li>f. Height and climbs involved</li> <li>g. Appropriate footwear and clothing</li> <li>h. Toilet / Refreshments facilities</li> <li>i. Meeting point and car park facilities</li> <li>j. Need of walker to bring and emergency telephone number (ICE) and relevant medical details</li> </ul>
On the day	
2	<ul style="list-style-type: none"> <li>a. Route</li> <li>b. Duration</li> <li>c. Terrain</li> <li>d. Potential hazards</li> <li>e. Information about stops along route</li> <li>f. Instructions about stopping the group if someone needs a break</li> <li>g. Be prepared to advise inadequately participants not to go</li> <li>h. Appoint a 'back-marker'</li> <li>i. Stay at the front and lead walk</li> <li>j. Set appropriate pace based on slowest person</li> <li>k. Stop as necessary to allow people to rest</li> <li>l. Report any accidents / incidents to Business Secretary and Group Leader's Liaison</li> </ul>

### Appendix 3 Physical Activity Group Checklist

All activities will be slightly different and will pose different demands on the group and responsibilities on the Group Leader. This is intended to be a guide and not an exhaustive list. Please add or delete measures as appropriate to accommodate the group type.

U3A Name:	
Interest Group:	
Type of Activity:	
Where held:	

	Description	✓
a	If being held outside ensure that the weather is suitable for the activity to go ahead	
b	Be prepared to cancel if conditions are not suitable	
c	Check that participants are wearing suitable footwear / clothing for the activity and terrain	
d	Be prepared to refuse participants if they are not wearing suitable footwear / clothing / equipment	
e	Give participants information about stopping the activity if they need a break or feel unwell	
f	Ensure any equipment being used is in a good state not to cause unnecessary injury	
g	Advise participants to warm up before starting activity	
h	Allow a break time for participants to rest and hydrate	
i	Report any accidents / incidents to Business Secretary and Group Leader's Liaison	

## Appendix 4 Cycle Leader Checklist

All participants of the Cycling Group take part at their own risk. Group members are responsible for informing the Group/Ride Leader of any health issues

U3A Name:	
Ride Leader Name:	
Distance:	
Terrain Type:	
Date:	

Before Ride – Inform cycling group members (as per quarterly programme)	
1	<ul style="list-style-type: none"> <li>a. Location</li> <li>b. Distance</li> <li>c. Linear / Circular Route</li> <li>d. Terrain</li> <li>e. Height and climbs involved</li> <li>f. Level of fitness required</li> <li>g. Appropriate clothing and helmet</li> <li>h. Toilet / Refreshment facilities</li> <li>i. Meeting point and car parking facilities</li> <li>j. Need for cyclists (and guests) to bring an emergency telephone number (ICE) and medical details</li> <li>k. Clothing / protective headgear required</li> </ul>
Designated Ride Leader for the day briefing before starting out	
2	<ul style="list-style-type: none"> <li>a. Route</li> <li>b. Duration</li> <li>c. Terrain</li> <li>d. Known hazards</li> <li>e. Emergency arrangements</li> <li>f. Be prepared to advise inadequately equipped cyclists not to go</li> <li>g. Perform 'M' check on all bicycles to ensure they are roadworthy</li> </ul>
Appoint a support rider for the rear of the group	
Leader stay at the front and keep in touch with support back rider	
Set an appropriate pace for the level of rider based on the slowest participant	
Stop when necessary to allow participants to rest and rehydrate	
Report any accidents / incidents to Business Secretary and Group Leader Liaison	

## Appendix 5 Accident / Incident Report Form

Name of injured participant or property owner:  
Address:  
Telephone Number:

Name / address / telephone number of any others involved:

Date / time of accident / Incident:

Location:

Circumstances of accident / incident:

Injury / Property damage details:

Name / address/ telephone number of person(s) involved in the accident / incident:

Witnessed by:

1

2

Address:

Telephone number:

Immediate action taken:

Details of any specialised assistance required at the scene:

Was medical advice sought at the time / afterwards? If so, give details:

Name of Activity / Group Leader:

Telephone Number:

Signed:  
(Group Leader)

Signed:  
(Injured party/parties)

## Appendix 6 – Group Request for Expenditure over £50

Name of Group:	
Nature of the Expenditure	
Estimated Cost	
Reason for the Expenditure	
Attach Evidence of Price Comparisons Obtained	

Please give any additional information that you feel is relevant to your request and that will be important to the Committee when assessing your request. If this is a request for a replacement, please indicate what will happen to the item being replaced.

Group Leader's Name: .....

Signature: ..... Date: .....

Chairman's signature approving the request on behalf of the Committee:

Signature: ..... Date: .....