



Welcome

Thank you for agreeing to be a Group Leader with Bolton u3a

This guide is to inform and support you in your role and we hope you find it useful.

Your role is vital in providing an informative and enjoyable experience for our members.

Thank you therefore for agreeing to share your knowledge, skill and experience to enable our members learn and gain pleasure from your subject matter

Thank you also for the time and effort you put into preparing for group meetings and leading their discussions.

This guide summarises key actions we ask you to consistently carry out to comply with our obligations to the wider U3a movement and the operating guidance from the Charity Commission which regulates our activities.

We hope it is clear and helpful to you and would welcome any comments or concerns you may have.

Good luck

Background to u3a movement and key principles.

You may be aware that the u3a movement originated in France. It was established in 1973 by the Faculty of Social Sciences at Toulouse, as an external adjunct to the University sector. In 1990, the concept was extended to provide access to education for the third age across all French universities.

The movement subsequently developed across Europe and is now established internationally. The UK introduced u3a in 1980 but modified the concept significantly, taking the view that most retired people had knowledge and skills that could be shared with others for their education and pleasure. Most English-speaking countries follow a similar model. By 2020, the UK movement had grown to one thousand branches with 450,000 members.

Bolton u3a was formed in 1991. It started with a handful of members and 2 interest groups. We now have a membership of over three hundred and run over 30 interest groups.

Like all local u3a's, Bolton is a member organisation of the Third Age Trust (TAT), the national support and advisory body.

All u3a's in the UK are 'operationally independent' - self-help organisations run by the voluntary efforts of their members and one of the most important aspects of such voluntary work is the role of Interest Groups, which are run by members but there is always help and assistance available from the TAT and/or local members.

Members who create and run such Interest Groups are much appreciated and will be given every encouragement and assistance in the formation and the running of the Group.

Group Leaders and regular attendees of the groups should be current u3a members. Attendees who may not be current u3a members, are allowed either 1 "taster" session at a maximum of 2 groups, or a maximum of 2 "taster" sessions at 1 group (at which they must pay the usual attendance fee) but must pay their annual membership (or pro rata at the current rate as detailed elsewhere) if they wish to continue attendances at the Group.

Before starting a new group, a potential leader should contact the local Group Leaders Co-ordinator (GLC) - see Contact List at end of this Handbook - explaining what the subject/ theme of the group will be and what will be required by way of venue and equipment.

Once the initial proposal has been discussed with the GLC, it will go before the committee for approval and any future changes will also have to be approved by the committee in advance.

It should be stressed that, if you have an idea for a new group, you don't have to be an expert in the subject - there may be other members interested but not necessarily experts either, but who are interested in exploring a particular subject. It is recommended that, for a group to be viable, it should try and maintain an average attendance of at least 6 members.

The frequency of meetings (which is usually once or twice per month, dependent on the topic) should be discussed with the GLC as should the anticipated start date and intended duration of the course, which may be "open-ended" or for a specific period (say 6-10 weekly or monthly sessions - there are no hard and fast rules).

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If the group is only intending to run for a short period, say 6 sessions, on a “pop-up” basis, then it would be feasible for it to meet weekly for its duration. It is not unusual for group sessions to break in July and August for holidays, and also in December, over the Christmas period, but not necessarily - it all depends on the individual leader and Group members.

Once agreed, the date/time of the new group will always be advertised in our monthly Newsletter until such time as the group ceases to operate so that once the group is up and running, you will be contacted direct by interested members.

An announcement about a new group’s formation will also be made at the general monthly meeting, to give it as wide publicity as possible, and it will also be detailed on the website. However, it is the Group Leader’s responsibility to send details of the first meeting, and any changes to its format, to the Newsletter Editor -see contact list - for entry in the next issue.

Please be aware of the deadline for entries which is no later than the 3rd Wednesday of the month.

Unless any details in your entry change, the Editor will automatically include your entry in future Newsletters without need for further contact. You could even supply the Newsletter Editor with a schedule of the Group’s meetings/topics, to avoid a monthly report.

Operating Principles to Consider

Venues:

To facilitate access for members, it has been advisable, historically, to use town centre venues but recent changes in Local Authority policy and the closure of some central venues by the owners, has meant that some of our once-favoured venues are no longer available.

However, there are suitable rooms still available at The Hub in Bold Street (Council run), at St George's & St Andrew's United Reform Church and Friends' Meeting House. The Committee is always keen to hear of other potentially suitable venues that we can use at a reasonable cost and if you do know of such a venue, please contact the Venues Co-ordinator, Steve Brown, whose details are to be found on the Contact List. Of course, it may be possible for a Group to meet at the home of the Group Leader or at the home of a group member.

Insurance cover:

An 'All Risks' policy, taken out through the TAT, is in place covering all U3A equipment wherever it is in use in the UK. There is also Public Liability insurance in place up to a limit of £10,000,000 on any one claim which indemnifies all Group Leaders, individual members, as well as the parent u3a.

in the event of a claim for injury &/or loss/damage to property occurring during an activity organised as part of a u3a activity, wherever that activity occurs in the UK, TAT recommends that all u3a's should keep a log of accidents/medical or other incidents which may occur during a Group's activities (see specimens at end of Handbook).

Any completed report should be submitted to the Committee, via the GLC, for it to be dealt with appropriately.

There are also Public Performance and Copyright Licences in force to allow for playing of recordings and photocopying of documents, should this be necessary.

Third Age Matters (TAM):

Group Leaders are encouraged to register for assistance on the national u3a website (www.u3a.org.uk), via the resource centre.

Day-to-day running of the Group

Attendance Register and Fees

Remember to collect the attendance fee from each member at every meeting - the attendance register can include this aspect. The attendance register should be submitted to the Treasurer on an annual basis, and all records will be retained for a period of 6 years. The register can be submitted via the GLC along with a brief report on the Group's activities during the year, for inclusion in the AGM documentation.

Where meetings are held in other public venues, you are still required to collect a nominal £1 per attendee to cover u3a public liability insurance costs.

From the total amount of attendance fees collected, you may take monies for routine expenditure (refreshment expenses etc). Details and receipts, if possible, of this expenditure to be shown for audit purposes.

If, as group leader, you occasionally want to purchase material assets for Bolton u3a, which include items for start-up or replacements, where the cost is likely to be more than £25 then you must seek permission from the committee or group leaders' co-ordinator beforehand.

Approval of the purchase is unlikely to be refused and will be recorded in committee minutes. The items will also be added to the Bolton u3a asset register.

Consumables used by group members for their personal use and retention must be paid for by the members themselves.

You must keep a record of all expenditure and income from subs to assist with accounting procedures.

Incident Reporting

Should there be an "incident", happening during one of your sessions, whether it involves physical injury/damage or other, it is recommended that an 'Incident Report Form' be completed and submitted to the Committee via the GLC, detailing circumstances of the incident. A specimen form is at Annex B.

It is recommended that you be made aware of any individual health problems of any Group member at the start of your Group's sessions.

Members are asked to carry with them, at all times, their membership card which should detail their "Emergency Contact". So, in the event of any problem you are not at a loss as to who should be contacted immediately. A reminder to your members to that effect would not go amiss!

Please contact the Group Leaders' Co-ordinator, should there be any difficulty or problem with the running of your Group. We are very appreciative of your initiative and willingness in becoming a Group Leader and remember that you will be given every encouragement and support in the running of your

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Group. As part of that support, twice a year there will be a Group Leaders' meeting at which you are given the opportunity to air your views and express opinions or concerns.

Remember that help/assistance in running your Group is always available, either locally or by using the Resource Centre at the Head Office of u3a, which is grossly under-used. Details of this facility is always shown in the Third Age Matters (TAM) magazine, and you may also access it via the u3a website - you may borrow items such as books, cassettes, CDs, DVDs etc free of charge other than for postage costs. Loans of such equipment (which may be booked in advance) are usually for a 3-week period, but this period may be renewed if necessary. Over 90% of u3a's use the Resource Centre for such materials to support and enhance their classes. Group Leaders are recommended to register on the national u3a website (www.u3a.org.uk) so that you may research the catalogue of items available.

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Remember also that Bolton u3a is a member of the Northwest Region of u3a's, who organise workshops and study days in the area, and details of such events are always advertised in the TAM magazine.

Also, a network of Greater Manchester u3a's has been formed which also runs similar events at a more local level. There have also been instances of neighbouring u3a's successfully 'sharing' courses whereby members of both u3a's attend and get involved in the participation - this is to be encouraged as it helps to ensure that the group's attendance figures are maintained at a viable level and the networking encourages the exchange of ideas for meetings.

Group leader should follow the following guidance:

- Ask to see the venue's risk assessment document and ensure your session adheres to the information therein.
- As group leader it is important to understand the venue's emergency procedures and establish the location of the emergency exits.
- The group leader should also be aware of the venue's alarm signals. Are there different ones for fire, bomb threat, intruders?
- Confirm on which days and time practice fire alarms are sounded and inform group members of these emergency procedures at the start of the meeting.
- Establish where the venue's first aid equipment is located and who is the venue's nominated first aider.
- If problems occur within the venue the group leader should contact, in the first instance, the venue's manager/ representative to resolve the issue. If this approach is unsuccessful then advise Bolton u3a's venue co-ordinator by email at venuescoordinator@boltonu3a.org.uk

Safeguarding Policy

A feature of modern life is the need to be aware of safeguarding issues which may arise and affect members' welfare. U3a has a general duty of care to its members but does not have any statutory authority in this regard.

If it is observed that a member is showing signs of distress or voices concerns about personal abuse they have experienced, especially between other members, then a tactful discussion, in a private space, is required.

The Branch has compiled a policy guide on this subject with an associated report form to be completed in the event of issues being raised by members or observed by Group Leaders.

The report form is at Annex D and following completion, the issue should be reported promptly to the Group Leaders Coordinator or the Chair of the Branch Committee, for support and agreed further action.

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Annex A

SPECIMEN ATTENDANCE REGISTER

GROUP NAME -

Member U3a number 1st session 2nd session 3rd session 4th session

Venue Checklist (Day of Use)

Address of Venue -	
Name of Interest Group -	
Procedure	y / n
1	Emergency Exits unobstructed.
3	Fire Extinguishers in place
4	Toilet facilities open, clean, paper available etc
5	Walkways free from trip hazards
6	Kitchen facilities accessible & clean
7	Kettle leads in good condition, free from wear and fraying, plug securely attached/PAT test sticker in place?
8	Refreshment items available

Notes

Signed

Dated

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Annex B

Incident Report Form (involving injury/damage)

Notifier name	
Group name	
Contact details Phone Email	
Location of accident	
Date and time	
Summary of what happened.	
Injured person's name and address	
U3A membership no	
Age of injured persons	
Severity of injury, if any	
First aid or remedial action given.	
Action taken by group leader.	
Member's nominated emergency contact informed.	

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Annex C Incident Report form (not involving injury/damage)

Notifier Name	
Group Name	
Date and time	
Location of incident	
Date and time	
Circumstances of incident	
Name and address of persons involved. Member's no if appropriate	
Details of any witnesses who could add information about the event	

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Immediate action taken following incident.	
Details of member's emergency contact who was informed.	
Any other observations	

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Annex D

Safeguarding Report Form

DATE INCIDENT REPORTED OR OBSERVED	MEMBER INVOLVED	NATURE OF ISSUE
DATES WHEN ISSUES OCCURRED	MEMBERS INVOLVED	LOCATION
EMPOWERMENT WHAT ACTION DOES MEMBER WISH TO TAKE What support do they need?	THEMSELF	BY U3A
PREVENTION WHAT ACTION CAN BE TAKEN TO AVOID REPETITION OF, OR ESCALATION OF, THE ISSUE PROBLEM	BY THE MEMBER	BY U3A
PROPORTIONALITY WHAT RESPONSE CAN BE OFFERED PROPORTIONATE TO THE MAGNITUDE OF THE ISSUE	BY MEMEBER	BY U3A
PROTECTION HOW CAN THE MEMBER BE HELPED OR PROTECTED FROM FUTURE ABUSE	MEMBER ACTION	U3A ACTION
PARTNERSHIP WHAT RELEVANT STATUTORY BODY NEEDS TO BE INFORMED		
ACCOUNTABILITY TIMELY AND ACCURATE REPORT PASSED TO TRUST AND REGULATORY AUTHORITY	BY MEMBER	BY U3a

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Role	Name	Phone	Email
Chairman	Jeanne Kelly	07740 625080	chairman@boltonu3a.org.uk
Vice Chair	Lynn Gray	07947027649	vicechairman@boltonu3a.org.uk
Business secretary	Liz Robinson	07806791847	businesssecretary@boltonu3a.org.uk
Group Leaders Coordinator	Duncan Macpherson	01204 403627 0798 8889399	duncan@dcamacpheron.me.uk or groupleaderscoordinator@bolton3a.org.uk
Membership secretary	Alison Dyson	01204 842311	alison.dyson1676@gmail.com
Newsletter editor & distributor	Pauline Treuherz	07850544900	newslettereditor@boltonu3a.org.uk
Venues co-ordinator	Steve Brown	07902 271323	venuescoordinator@boltonu3a.org.uk
Treasurer	David Dean	07599 826874	newslettereditor@boltonu3a.org.uk
Monthly Meetings Front of House			
	Non	Committee	Member
Meetings Speakers Bookings	Win Conway	01204 398838	winifredconway0@gmail.com

Annex E

Branch Committee Contacts