u3a LUTON

GROUP COORDINATOR'S HANDBOOK

Quick Start Guide – see overleaf

This handbook aims to provide you with information and good practice guidelines which will help you in this role and so we ask you to read it all as soon as possible. However, just to get you started, we have summarised a few key points which will help you to understand how u3a groups work.

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ESSENTIAL INFORMATION & QUICK START GUIDE

Interest Groups are at the heart of the u3a and allow us to offer the widest possible range of topics and activities for lifelong learning. In u3a there is no distinction between the teacher and the learners; they are all u3a members. However, each group benefits from the dedication of a Group Coordinator who volunteers time and enthusiasm to help others to learn alongside them.

- The Groups Liaison Service (GLS) supports and promotes all interest groups in u3a Luton and can provide information and assistance to Group Coordinators. If an existing group needs help with recruiting new members or changes its published information (included in the Groups List, newsletter and website) please contact GLS. All group coordinators should be familiar with u3a policies and procedures referred to in this handbook and on our website.

- All members of a group **must** be fully paid-up members of u3a Luton to ensure that they are covered by Public Liability Insurance. A register of group members should be kept and membership checked annually. Our online membership administration system -**Beacon**- can be used by Group Coordinators to assist with this and emailing members -training will be provided if you wish to use it. If the group is full, enquirers should be added to a waiting list and either brought in to the group as soon as possible or notified to GLS so an extra group can be considered.

- Each group is expected to be self-financing and the members decide together on the level of subscriptions necessary to cover the group's needs and expenses which will vary for each activity and venue. Accounts should be kept of income and expenditure and a financial return submitted to groupstreasurer@u3a-luton.org.uk every quarter. If no money is collected then a NIL return should be submitted. Expense forms can be found on the website or sent on request.

- No u3a money should be held in a personal bank account but a cash float (subject to insurance limit of £100) is allowed to enable smooth operation of the group. Larger amounts can be deposited in our main account and ring fenced for your group's use. If a group disbands then any cash float or banked funds will be transferred to u3a Luton general funds. Any equipment or other materials purchased by group funds becomes the property of u3a Luton and it is required that details of such items be submitted to the Executive or GLS so it can be added to the Equipment Register. Items on this list are then available for loan to other groups.

- Our insurers request that you undertake a risk assessment for all activities and outings to safeguard members. **Templates can be found on the website** (https://luton.u3asite.uk) or sent on request. Risk assessments could be used as evidence in the case of a claim being made against a u3a member and should be retained for 3 years. Checklists should be completed once for each host/venue and then only need be reviewed if something changes. Day trips or walks will require a checklist for each route or destination.

- All accidents however minor and irrespective of whether specialist assistance was required should be reported within 3 days to secretary@u3a-luton.org.uk using the accident form – which can be downloaded from the website or supplied on request.

- Coordinators can consult www.u3a.org.uk or publications such as *Third Age Matters* for subject advice and new ideas and for helpful information on enabling equal participation and diversity.

1. The Purpose of u3a Interest Groups

The u3a is a UK wide movement which brings together people who are no longer in full time employment or raising a family to enjoy their Third Age and to develop their interests and continue their learning in a friendly and informal environment. The u3a national body -The Third Age Trust- looks after all u3as by providing educational and administrative support.

Local u3as offer activities which aim to satisfy the widest possible range of interests: educational, cultural, recreational, physical and social. Interest Groups are a vital means of doing this.

Interest Groups are autonomous and self-financing. The Groups Liaison Service in u3a Luton is available to support and advise so that groups can operate smoothly for all their members.

2. Who Are Group Coordinators?

- Individual groups are organised by Group Coordinators who volunteer their time and skills to help others learn.

- The Group Cordinator is a member of the group who may have a body of knowledge, skills or experience in the chosen subject; although this is not essential. They take overall responsibility for the activities and plan the yearly programme, usually after discussion with members.

- They are the link between the group members and the u3a Luton Group Liaison Service (GLS).

- Each group also needs someone to act as the group contact, keep the register and do the accounts. Some groups have a coordinator who does all these things. In other groups the tasks are shared.

- Some groups have an assistant group coordinator to act as deputy when the coordinator is absent and to share the duties of organising the group's activities. For a larger group a committee may be appointed to assist with these duties. Succession planning is important.

- The frequency of meetings, venue, refreshments and other related matters should be discussed and agreed by the group.

- Group Coordinators are not entitled to any financial benefit or discount arising from their position. For example, when organising a group trip the benefit of any “free place” offered must be shared between ALL participants.

3. Role of Group Liaison Service

Overall Aim: To support and promote established interest groups and to assist members to start new groups when required.

3.1 GLS keep the lists of available groups and their contacts up to date for Beacon, the website (https://luton.u3asite.uk), newsletter and GLS notice boards. **GLS rely on Group contacts to keep us informed of any changes.**

3.2 GLS promote those groups who are actively seeking new members in the newsletter and on the notice boards at the monthly meeting. **If you are looking for new members, do let GLS know.**

3.3 Where groups are full, Group Coordinators can liaise with GLS to maintain a waiting list of enquiries. Group Leaders should try to make sure that members can join the group as soon as possible. **If you have a lengthy waiting list, let GLS know and we can explore starting an extra group.**

3.4 If members suggest new subjects for groups, GLS promote those on the GLS notice boards at the monthly meeting and in the newsletter and when we have viable numbers we work with the interested members to get the group started.

3.5 GLS publish the Group Coordinator's Handbook to provide useful information and guidance for new group leaders. We include useful information about Interest Groups on the website and, at intervals, we produce a printed brochure.

3.6 GLS try to bring New Members together in regular meetings to explain how u3a works and also organise occasional meetings of Group Cordinators to share best practice. We also work with Members Liaison Volunteers to ensure new members are contacted by telephone in their first year of membership to offer support and information.

3.7 GLS provide **Beacon** training for Group Coordinators who wish to use this u3a dedicated online membership system to administer their group and email their members. **Ask us for more information.**

How else do you think GLS could help you?
We welcome your feedback.

For contact details see the newsletter or email gls@u3a-luton.org.uk

4. Key Responsibilities of the Group Coordinator

4.1 To Keep Registration Information

- A register of group members should be kept for all meetings for both insurance and statistical purposes. **Ask GLS about using Beacon to help.**

    - All members of a group must be fully paid-up members of u3a Luton to ensure that they are covered by Public Liability Insurance.
    - Potential members are permitted to attend a maximum of two Interest Group meetings, at the discretion of the group, and/or two General Meetings before paying the Annual Subscription and becoming a member of u3a Luton.
    - After annual renewal of memberships each year,coordinators should check attendee's membership status. (**Beacon** will alert you to non renewals or you could physically check membership cards). Only u3a members can attend groups regularly or insurance is invalidated. Please ask for further advice from GLS if there are any problems.
    - Please obtain membership number from all new members when they join the group before adding them to the register.
    - The group should agree a policy about notifying and removing habitual non-attendees from the group after a certain time to allow new members to join.
    - Once the group is full, keep an up to date list of enquiries on a waiting list. (**Beacon** can help with this). If the list becomes lengthy then notify GLS who can investigate starting an additional group.

- Members are asked to confirm when joining u3a that they are happy for their details to be stored and shared electronically with other members for u3a purposes.

    - If you give all members of the group an electronic or hard copy of the group list please make sure to keep this up to date.
    - Please provide GLS with a copy of the group member's list regularly - if you are not using **Beacon.**
    - **Beacon** will allow you to email all group members safely and efficiently but if you are not using **Beacon** it can be helpful to construct a group email and you **must use blind copies** for bulk emails. Ask GLS for help if needed.

4.2 To Ensure Adequate Financial Records are Kept

- Each group is self-financing and the individual member contributions should be large enough to cover the group's needs and expenses. All costs for photocopying, venue hire etc need to be shared amongst all members.

- The group members decide how much is to be paid at each meeting to cover costs such as venue hire and if held in a member's home, how much the meeting's host should receive for refreshments. (The usual contribution is around 50p for tea/coffee and biscuits.)

- No subscription is payable when the group meeting is an outing where members pay their own entrance fee and travelling costs.

- The group's designated treasurer should keep a record of all monies received and spent. Every quarter in each financial year a summary Income and Expenditure Account should be sent to the Groups Treasurer, who prepares a report for the Executive Committee. groupstreasurer@u3a-luton.org.uk

See Section 5 for further information for treasurers

- Letter of Authorization **-** A letter of authorization should be signed by each group coordinator to enable their registration and financial records to be released in case of unforeseen circumstances.

4.3 To Follow Current Accident Procedures

- In the interests of Data Protection, Group Coordinators are not required to keep records of their members' medical conditions. However, it would be helpful to be made aware of members who wear or carry Medical Alert information, in order to assist medical professionals to locate this in the event of an emergency. Members are responsible for ensuring they do not participate in activities which would be detrimental to their health or well being but Coordinators should carry out a risk assessment (see section 4.4) and must inform all members of the group of any risks which might be incurred such as flashing lights, steep climbs etc

    - Group Coordinators should encourage members to carry their membership cards with contact details of next of kin on the back of the card. Emergency contacts are stored on Beacon and if the group coordinator cannot access this they can contact GLS, Membership Secretary or Secretary for this information (see newsletter for contact numbers).

    - All accidents, however minor and irrespective of whether specialist assistance was required, should be reported within 3 days to secretary@u3a-luton.org.uk . Two copies of the accident form should be completed: one for the u3a Luton secretary, who keeps an accident report book, and one for the Group's own records.

4.4 To Conduct Risk Assessments/Safety Checklists

Our insurers advise that Group Coordinators conduct risk assessments for venues, activities and outings to identify, communicate and mitigate any potential hazards for our members.

The following example safety checklists are included in the Essential Forms section of this handbook and website and we ask you to familiarise yourself

with them and to use them as appropriate when planning activities or choosing venues:

- ✓ Venue Risk Assessment Checklist
- ✓ Trips & Outings Safety Checklist – use when planning and on day of trip
- ✓ Walk Leaders Safety Checklist – use when planning and on day of walk
- ✓ Home Risk Assessment Checklist
- ✓ Sporting Activity Checklist

For sporting activities we also advise you to consult the website for any governing body (eg. Ramblers Association; Table Tennis England etc) to make sure you are familiar with their specific safety guidance.

How often should a risk assessment be completed?

For homes and venues conduct a baseline checklist as soon as possible and then

- If the activity moves to a different host or venue
- If the home or venue changes in a significant way that would impact the group eg. building works, blocked exits.
- If any additional hazards have been identified eg. new equipment or a new pet.

For sporting activities conduct a baseline checklist as soon as possible and then:

- If the activity moves to a new venue
- If the venue changes in a significant way that would impact the activity eg. change in surface or building works
- If any additional hazards have been identified eg. new equipment, changing circumstances of members

For day trips – before each trip

For walks – for each route and for each walk leader and if new hazards are identified.

How long do we need to store each risk assessment checklist? For up to three years after each trip or walk or activity took place as this is the timeframe in which insurance claims can be made.

4.5 To Maintain A Lively And Welcoming Group

Some good practice suggestions to help:

- Agree to start group sessions on time and make sure all members are informed of any changes to the timetable or venue.

- Hold an informal review session after a few months and then at least annually. It will help to sustain the group and ensure that members' expectations are being met.

- Make use of resources and subject advisers provided by the national u3a. See Section 4.6

- Group coordinators need to be aware of the problems their members and potential members may experience, whether age-related or not. With a little planning, they can ensure that participation is increased by addressing accessibility needs such as hearing, visual impairment, mobility, dementia, neurodiversity. All members should be valued and respected and inclusion and diversity must be encouraged and supported. For more information and support visit the national website advice pages (see 4.6 below), see the u3a **Accessibility, Equality, Diversity & Inclusion policies** on the website (https://luton.u3asite.uk) or talk to GLS or the Accessibility Officer.

- Group Coordinators should also be familiar with the **Privacy and Data Protection** policy and the **Complaints Policy**. Where conflict or difficulties arise within the group then help can be sought from GLS. The aim should be to enable all parties in a complaint or conflict to understand each other's viewpoints and for lessons to be learnt. No member should be removed from a group without explanation or discussion.

- Group Coordinators should be aware of our **Safeguarding Policy**. Leaders can speak to GLS or the Safeguarding Officer if they have a concern relating to the welfare of a u3a member. Once a concern has been raised the Committee will complete a safeguarding risk assessment, seek advice and support from the Trust and contact relevant statutory authorities as needed. The risk assessment will include risk to an individual member; risk to other members within u3a and the reputational risk for u3a. Examples of safeguarding issues and how to respond are included in the policy.

- Group Coordinators must update GLS of any changes to the group's details for amendment in the group activities list and website. If the group has vacancies and no waiting list, notify GLS who will advertise on the GLS notice board at the monthly meeting and in the newsletter.

- If relevant consider giving a display of the group's work at monthly meetings on the noticeboards or screen slideshow. Check with GLS in advance for availability of these resources.

4.6 Further Information

You will find much useful information in the Members Area of the u3a national website (www.u3a.org.uk). To access the members' area you will need to register and create log-in details. Check out the Advice and Guidance section under the 'Support for u3as' tab.

All u3a members can opt in to receive the publication *u3a Matters* and the u3a Friends email newsletter which include inspiration and useful tips.

GLS have several copies for loan of "Time to Learn" a booklet which describes the "u3a method" of informal learning. Do ask if you would like to borrow one.

5. Further Financial Notes for Groups

5.1 Most groups have contributions paid by members and some costs which have to be paid from this income. It is essential to keep a record of all income and expenditure, as it happens. This information will be used to prepare the Income and Expenditure Account submitted to the Groups Treasurer on a quarterly basis.

5.2 Groups are not permitted to have bank accounts in the name of u3a; monies collected must be kept safely and separate from personal money by the designated group treasurer. If you reach a point where you have substantial amounts of cash, (it is not advisable to hold more than £100), the surplus should be handed over to the Treasurer who will bank it in the u3a Luton Operating account to be held against the future requirements of the group. Similarly, where a payment needs to be paid by cheque for an invoiced expense (such as a hall or coach booking) the cash can be handed over to the Treasurer who will issue the cheque to settle the invoice.

5.3 If a group has a surplus of income over expenditure at the end of the year and wishes to do so, a contribution can be made to the u3a Luton main account. If a group disbands then all remaining funds must be transferred to general funds.

5.4 Receipts must be obtained for expenses and purchases wherever possible. It is acceptable to reimburse members for out-of-pocket expenses incurred on behalf of the group as follows (with a suitable note in the group's account records): Local telephone calls = 10p each; black & white prints/copies from a home printer = 5p each; mileage = 45p per mile. – *figures subject to review so check with treasurer.*

5.5 An Income & Expenditure Account must be submitted to the Groups Treasurer every quarter (30th June; 30th Sept; 31st Dec; 31st March) each year. Please submit to groupstreasurer@u3a-luton.org.uk as promptly as possible. A standard form is provided or you could use the ledger in **Beacon**. In the event that a group has no income or expenditure at all a **nil return** must be submitted. (Please note that if all income is spent this does not mean a nil return is appropriate. Nil returns apply when no fees are paid by group members and no expenses incurred).

5.6 Financial records must be kept by law for seven years. The Treasurer maintains the main archive and will also keep your group records if requested to do so.

5.7 All u3as are members of the Third Age Trust and have charitable constitutions with charitable objects and purposes. The Third Age Trust is a registered charity and bound by Charity Commission rules. The Treasurer can advise how this may affect your group if you are planning something outside the normal group activities.

6. Frequently Asked Questions

Can a u3a Interest Group make a donation to other charities?

A one-off donation to a charity at the request of an external speaker does not contravene the rules as it is in lieu of a fee but a signed instruction from the speaker must be kept (see section 7). It is also acceptable to organise a small event or collection in support of a charity providing it is clearly stated that all monies raised will go to that charity. The money raised must not under any circumstances be passed through a u3a bank account. Ideally the money should be handed directly to the charity.

Our group does not pay any subscriptions or spend any money so do we have to complete a quarterly return?

You should notify the Groups Treasurer that you have a NIL return but you must do this each quarter so that s/he knows that your circumstances have not changed.

Is any financial support available for new groups?

If a new group requires rented accommodation then financial support may be given for the first three meetings. Groups should apply to the Treasurer who will seek approval from the Executive.

Similarly, funding may be provided to purchase essential equipment which should then be made available for use by other groups as appropriate and noted on the Equipment Register. Ask GLS for a copy of the Equipment Register if you wish to borrow equipment or before major purchases.

What insurance cover do u3a members and group leaders have?

Public and Products Liability – indemnifies all u3a members against all sums you could become legally liable to pay as a result of accidental injury to or death of any person or accidental loss or damage to property not belonging to you which arises in connection with u3a business. Risk assessments are required.

Money cover – covers u3a cash held in members' homes, hired premises or in transit (excluding loss from unattended vehicles, fraud or shortages and errors).

Home Contents Cover – covers damage to the property of any u3a member whilst their home is being used to host a u3a interest group/meeting.

Equipment Insurance – covers loss or damage to property owned by a u3a, wherever it is held or in transit, provided due diligence is observed and reasonable precautions are taken to store it securely. If the equipment is left at a venue used by non u3a members please store in a locked cupboard.

Note – more information on insurance including an overview and FAQs is available on the u3a website or you can contact GLS if you need further advice or a copy of the insurance certificate.

Important Note – With certain exceptions for occasional attendance with Executive approval (eg. prospective new members or spouses and carers) this insurance cover only applies to paid-up members. Group Leaders should always ensure that regular attendees at their meetings have a current membership card or you may find yourself without liability cover.

Are we required to have trained first aiders within our u3a?

You are not required to do so and insurance advice is to contact the emergency services immediately in the event of a serious incident, even if there happens to be a member present who has attended a first aid course.

If members wish to learn more about First Aid/CPR they can consult websites or apps for British Red Cross, St John Ambulance and the British Heart Foundation.

What if a member administers first aid that goes wrong?

Members are covered by u3a insurance if they provide first aid.

Why are we required to have a health and safety policy and follow health and safety guidelines?

The relevant legislation is The Health and Safety at Work Act 1974 which although it does not place a legal requirement on the u3a to have a policy because we are a voluntary organisation, it is clear that the u3a has a duty of care to its membership. This means that health and safety needs to be a consideration for general meetings, trips, outings and activities and your u3a will need to demonstrate they have an awareness of what is appropriate in relation to this.

Should we be carrying out risk assessments for any/all of our activities?

Our insurers ask that you undertake a risk assessment for all activities. Risk assessments can be used as evidence in the case of a claim being made against a u3a member. The Trust has prepared a set of simple risk assessment checklists based on different risk levels and venues which you could use or adapt for your group.

7. Essential Forms and Further Information

The following forms are enclosed (or can be supplied on request):

- ❖ Letter of Authorization to Release Records and Accounts – *complete and return to GLS.*
- ❖ Summary Income and Expenditure Account for Groups – *for quarterly use.*
- ❖ Accident report Form
- ❖ Risk Assessment Safety Checklists
- ❖ Payment to Speaker's Charity declaration

7.1 u3a Policies available on the website

https://luton.u3asite.uk/policy-docs

- Accessibility policy
- Complaints Policy and Procedure
- Equality, Diversion and Inclusion Policy
- Privacy and data Protection Policy
- Safeguarding Policy and Procedure