



U3A Carrick

Dear Group Leader

Thank you for considering, or taking on, the role of Group Leader within our U3A; without all our Group Leaders, we could not exist. We hope you will enjoy this important leadership role.

But you are not alone; if you have any queries or difficulties then the Groups' Coordinator or any other member of the committee will be willing to assist. You can find their contact details on the Contact Us page of any recent newsletter.

The attached document may appear at first glance appear as a long and daunting document. You do not need to take all this onboard at a first go. In writing this, we wanted to cover everything that you *might* need to know at some point, so it is all here hopefully, and should be used as a resource as required.

There is a simple contents list on the first page. In the main text, most paragraphs start with a heading to help you identify specific points.

We hope you find this document useful. We welcome your feedback with a view to making subsequent editions even more informative, focused and relevant.

Thank you again for taking on this important role.



THE UNIVERSITY OF THE THIRD AGE

U3A Carrick

Group Leaders' Information Pack

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This edition 9/12/2017

1. Our U3A

The University of the Third Age is an association for the retired or semi-retired providing educational, creative and leisure opportunities in a friendly environment. It is a self-help association, relying on members themselves to volunteer to lead or coordinate groups.

U3A Carrick is the largest U3A in Cornwall with a membership that normally varies between 900 and 1000 members. We usually have around 150-200 meetings and activities every month, organised by about 90 groups, so there should be something to interest everyone.

Meetings. Most of our meetings and activities are held during daylight hours on weekdays, but a few groups meet in the evenings or at weekends. Meetings are held in hired rooms or schools, members' homes and some activities take place out of doors. Most groups meet in or around Truro, Falmouth or Perranwell. Subscriptions pay for the hire of venues and normally there is no supplementary charge. Members may attend as many groups as they wish, but some groups that meet in private homes, with limited capacity, may have a waiting list. Other groups are open to all members, although short-term waiting lists may be required.

2. Objects of the U3A

The formal Objects of our U3A as stated in our constitution are:

- (i) to advance the education of the public and in particular the education of older people no longer in full time gainful employment in Truro and Falmouth and its surrounding locality.
- (ii) The provision of facilities for leisure time and recreational activities with the object of improving the conditions of life for the above persons in the interests of their social welfare.

Education. 'Education' is here used in its broadest sense to include many activities be they formal courses, games, sports, talks, social get togethers or opportunities to acquire a new skill. U3A is a co-operative and mutually supportive organisation and it is hoped that members will contribute in any way they can, by experience, expertise and by active participation. The emphasis is on shared learning, keeping our minds and bodies active and, of course, enjoyment.

3. The Contribution Group Leaders Make

Groups are the life blood of the U3A and Group Leaders are the people who make groups happen.

Role. You are leading a group on behalf of our U3A. Your main function is to make all the necessary arrangements for the group meetings. The emphasis is on shared learning. Do not take on your shoulders all the duties within your group. See if others are happy to take on various aspects of running the group. This way your group will thrive and the members will feel involved.

Having Fun. Some groups meet with the overt intention of having fun. They may take pleasure in playing various games, chatting over a coffee or in joining together to prepare entertainment for the U3A. Other activities have both mental and physical benefits. Card games, board games, depend on short term memory. More active pastimes like social dancing, table tennis etc. are valuable in that they provide regular physical exercise and help with blood supply to the brain.

Group Leaders' Meeting. A meeting of group leaders is held once a year and is a good opportunity to meet with others and discuss success and problems. Before the meeting it would be helpful if you would indicate any issues you would like to raise.

Training. Group Leaders do not receive any formal training but should liaise with the Group Coordinator for any support they feel they might need.

4. How to Set Up a New Group

Start here. The essential ingredients for setting up a new group are a willing and enthusiastic Group Leader, that's you, a body of members who share your passion and a regular time and place to meet. To get an idea of the kinds of groups that already meet, see any newsletter and/or our website at www.u3acarrick.org.uk

Committee Agreement. Before you start to look for 'your body of members who share your passion' you need to get the Committee's agreement to go ahead, so initially contact the Groups' Coordinator to discuss your ideas. See the Contacts page of any newsletter for contact details.

Committee Encouragement. In principle, the Committee will support any good ideas that are within a sensible budget and further the objects of the U3A. Normally a group which needs to hire a venue will be given 3 months' provisional approval. Full approval will be dependent upon having a sufficient number of members at the end of the probationary period.

Finding Members. To find members for your proposed group you can:

Put out interest sheets at the Truro, Falmouth and Perranwell monthly meetings for people to sign up to.

Contact the convenors before the monthly meeting to ask to say a few words to promote your proposed group.

Send copy to the newsletter editor by the next newsletter's deadline advertising your proposed group. Three examples towards the end of this document.

Request a Post on our Facebook page. Send your copy to the newsletter editor.

Meeting Place. Where to meet? If you can host your group in your home then you will not need funding and approval to go ahead will not be difficult. If you need to hire premises then you will need to find somewhere suitable and apply to the committee for funding. The Groups' Coordinator may be able to help with suggesting possible premises. Consider: the likely size of your group and the fact that not everyone who shows an interest at the start will stay with you, how often you would meet and the cost of the premises. The committee will be looking to see that value for our members' money will be obtained.

Hire Agreement. If an agreement for venue hire has to be signed then that has to be done by a member of the committee. Pass it through the Groups' Coordinator.

Further Advice. See the national U3A's website for lots of useful ideas on how to start a group at <https://www.u3a.org.uk> Click the tabs/links: Advice, Supporting Your Members, Interest Groups, Starting an Interest Group.

Closed Groups. No groups are closed to new members. The single exception is where a group meets in a member's home and that home physically cannot accommodate any more people. If your group becomes so popular that it outgrows its premises, or becomes no longer effective, then there is advice on how to manage the situation on the national U3A website at <https://www.u3a.org.uk/advice/growth/232-waiting-lists>. Although this webpage primarily addresses U3As as a whole, the principles of access and inclusion should also apply to groups.

What Is Not Expected of You. You are not expected to:

- Arrange transport for group members.
- Provide personal services for infirm members.
- Arrange for the provision of refreshments, although many do.

The First Meeting. For your first meeting, you should discuss with your group what the group intends to do, and when and where it should meet. No time and place will suit all; compromise and negotiation will probably be required.

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

- What would we like to do? Include the range, content and nature of the subject to be studied, the time scale etc.
- How can we achieve this? What common knowledge do we have already? What resources can people contribute? How will we organise the group? Who will do what?
- What study/learning methods can we use? Books, DVDs, PowerPoint presentations, online material, online courses etc.
- Volunteer experts who can be invited to demonstrate skills or give occasional talks.
- Demonstrations. Trips/events etc.
- Learning by playing

5. Once Your Group is Established

Contact List. For small and modestly sized groups it is good make a list of your members and their contact details in case you need to change arrangements at short notice. Members will appreciate it if you give your contact details to them.

Attendance Register. Create an attendance register for use at each meeting. A simple tick register is all that is required with names legible printed. An example is towards the end of this document. It helps to have names in alphabetical order of surname. The completed register needs to be sent to the Treasurer at 1st August, 1st December and 1st April. The reasons for this attendance register are:

We want to make sure all attendees are members of our U3A. Anyone participating who is not a member is taking advantage of our organisation which is paid for by the rest of us.

We need to be sure we are fully covered by our insurance. Some might argue this is not a big issue for some groups, but probably the most at risk is the group leader who might otherwise have some personal liability if there was an accident or injury.

We need to be sure that U3A expenditure on a group has not become unreasonable. Your committee needs to ensure cost effectiveness as funds get tight especially when resources are stretched to support new groups.

And finally, should there be fire or other emergency where you are, you will need that day's attendance record to be sure that everybody is safe and accounted for. Don't forget to grab the register if you have to evacuate a building.

Cancellation. If a booking for venue hire is not going to be used, and it is possible to do so, then that booking needs to be cancelled by the group leader and the treasurer informed to ensure no unnecessary overpayment.

Outside speakers. If an outside speaker is required this will need to be discussed with the Group Coordinator if that speaker requires a fee.

Informed Choice. Make sure you give sufficient information for group members to make an informed choice as to whether they wish to participate and then make their decision; this is particularly important if you are running a physical activity. Do not make the decision for them or exclude them from a particular activity. Remind members if you are doing a physically active subject that they undertake it at their own risk.

Enquiries. New members are constantly joining our U3A. Even though your group may be flourishing as it is, it is important to respond promptly to enquiries whether in person, by telephone or by email.

Calendar. The calendar on the website, and hence the calendar in the centre-spread of the newsletter, needs to reflect accurately what your group is doing. When there are changes to your regular meetings, e.g. Christmas and summer break, if you have one, let the newsletter editor know.

6. At Your Meetings

Venue Safety. When you arrive, you should check that the venue is safe to use, to reassure yourself that everything is in place and as it should be. If you have any safety concerns do not continue if they cannot be resolved to your satisfaction.

Attendance Register. Get everyone to tick the attendance register.

Welcome. Make sure everyone knows everyone else, if this is practicable and remember that new members can find it daunting entering an established group, especially in someone else's home.

Members Only. Ensure that everyone is a member of U3A Carrick; if in doubt you can check with the Membership Secretary. Prospective new members, at your discretion, may be allowed up to two attendances before becoming members.

7. Money

Tea Money. There is unlikely to be a need for you to raise money from the membership. An exception may be for 'tea' money to fund refreshments which should be for no more than to cover their actual costs. It is good practice to keep a record of monies collected and spent.

Other Funds. Should you wish to raise other funds, they may only be as voluntary contributions and for a specific purpose. Any monies raised become the property of U3A, not the group, although the committee may agree to earmark funds for a group where they have been raised by a group for the purposes of that group. These funds should be cleared at the earliest opportunity. All funds must be properly accounted for with records kept and all monies handed to the Treasurer at the earliest opportunity. You need to inform the committee of your proposed fund-raising.

Other Expenses. The committee may be able to meet some modest expenses beyond those of venue hire. You will need to apply to the committee through the Groups' Coordinator. Do not spend money without pre-authorisation.

U3A Ownership. Equipment purchased on behalf of a group becomes the property of the U3A and needs to be identified as such. Details of the purchase need to be given to the Treasurer who will arrange for its entry on the U3A Equipment List.

8. Dealing with Problems

Accidents. If anyone in your group has an accident, deal with the matter, calling the emergency services if required. Send a completed signed report form to the Groups' Coordinator; keep a copy for your own records. There is a form towards the end of this document. What is said and done after an accident has legal implications. It is important to deal with even minor incidents correctly.

Safety Awareness. It is recommended that you make yourself aware of potential issues that may be associated with your group's activity in order to ensure the safety of our members. This is just good common sense. If you can demonstrate awareness and having taken sensible steps it is harder to be blamed if things go wrong. If you record what you have done it may be useful to show that you have been diligent in case of a claim.

Being aware of potential danger is just as appropriate in the home as in public venues but in the latter case we may rely largely on the management of each venue to carry out their own reviews of risk for us, as visitors. In the home, as well as thinking about our own safety, we need to consider hazards for others coming into our premises.

As a group leader, members of your group will see you as the person in charge and will probably expect you to manage everything for them at group meetings. Being aware of potential safety issues is all part of that role.

Possible areas to consider are listed by the Third Age Trust website at <https://www.u3a.org.uk/advice/insurance-and-safety/336-risk-assessment>. Those forms are reproduced at the end of this document. Some items will not apply to all venues. All factors may not be covered for some venues.

Venue Risk Assessment Checklist. May be completed for each venue annually and retained by the group leader.

Venue Checklist Day of Use. May be completed and retained by the group leader before each use.

Walk Leader Risk Assessment Checklist. May be completed by the walk leader before each walk and retained by the walking group leader.

Concerning other members. Almost all meetings go smoothly but very occasionally there are problems. If there are difficulties with an individual that cannot be resolved by discussion with that person then contact the Groups' Coordinator, who may also involve the 'Designated Trustee'. They can take things to a more formal level if appropriate. You may identify the current Designated Trustee on our website at <http://www.u3acarrick.org.uk/about.html> where there are also details of our Sorting Out Problems and Grievances procedure.

Isolated Serious Problem. If you have a serious problem in a session, it is quite acceptable to ask a member to leave or to close that session but you cannot exclude a member permanently. If you are not happy to have an individual member in your home or in your group then it may be necessary to change the venue or the group leader.

Unable to Cope. If you have a member who is not able to cope independently, inform your Groups' Co-ordinator.

9. Changes

Leadership, Venue and Time. When there are changes of leadership, venue or time or duration of meeting you need to keep the Groups' Coordinator informed. You will also need to inform the newsletter editor who also manages the web calendar, from which the centre-spread of the newsletter is drawn. You will probably wish to write a short piece for the Group News section of the newsletter.

Closing a Group. If you are no longer able or are unwilling to lead your group discuss the situation with the Groups' Coordinator. Before the group folds the group will need to be consulted with a view to finding a new leader. If no person is then willing to lead the group then, in principle, the group will close and any money or property held is to be returned to the U3A.

10. Insurance

Extent of Insurance. Our U3A, through the national U3A has insurance cover for its legal liability for accidental death and injury of its members and accidental loss or damage to property and for the legal liability of trustees. Exclusions and excesses apply. For more details contact the Chairman. The policy document states:

"The policy is set up to protect all U3A members, and includes 'member to member' cover so if somebody is injured undertaking a U3A activity and legal liability could be proven against another member, the insurers would deal with it. This means that group leaders are completely protected, should there be a claim for damages following an incident in their group." And,

"If a U3A uses a member's home to hold an interest group or run a meeting, is it covered for Public Liability? Yes, subject to the normal test of legal liability. Injury or damage due to a defect in the property is the legal responsibility of the house owner/occupier and cover is provided under householder insurance."

Non-members who are deciding whether to join are covered, but for no more than two sessions.

Paid Speakers and tutors. Our insurance covers paid speakers at general or interest group meetings but it does **not** cover paid tutors.

Other risks. Other risks are those of the members. The first call with respect to accidents in members' homes is on the householder's own insurance. Members are not covered by personal accident insurance

Home Inspections. The U3A will not carry out a health and safety inspection of a member's home before it is used for a meeting.

11. Keeping Up the Profile of Your Group

Without new members, your group can wither away as people leave for their own various reasons so it is good to keep your group in the whole of the U3A members' eyes. Please consider writing a piece for the newsletter. See any newsletter for examples. It is not necessary to do this every month, although some do, but a regular contribution is a good idea. Similarly, make comments to Posts on our Facebook page or request a new Post by contacting the newsletter editor.

12. Further Advice

The Groups' Coordinator is your first port of call for advice.

National U3A website. There is also lots more useful advice for prospective Group Leaders on the National U3A website. They are referred to here as Group Convenors. Go to www.u3a.org.uk and click on the Advice tab, then the Supporting Your Members tab and follow the links.

Example of proposals for a new group for the newsletter

SHORT WALKS

I am willing to start and lead a new short walking group to include nature observation on the way. Various environmental conditions such as woodland, marsh, and sea shore will be included. The proposal is to walk about 1.5 to 2 miles at a leisurely pace lasting approximately two hours.

Subject to the amount of interest we will start in April and go through till September every two weeks. If you are reasonably fit with an interest in the countryside, flora and fauna please contact me.

Name phone number email

FAMILY HISTORY

I have been researching family histories for more than 15 years. As a member of the U3A in Surrey I belonged to a Genealogy Group and found the information learnt there extremely useful.

Several U3A members here in Cornwall have told me they wished we had such a group here and why didn't I share my knowledge. To better gauge the need and, if there is a need, to get some idea of numbers I am now seeking expressions of interest.

I would anticipate the group would meet probably weekly in 'term times' for 2-hour sessions. If a group is established I would be looking to start from the beginning i.e. for those with little or no knowledge of how to start and where to look; it probably wouldn't suit people who have been researching their family history for several years; they might lose interest very quickly having to go at the pace of the beginners.

If you would be interested in becoming a member of this group please contact me.

Name phone number email

FRENCH READING

I am looking for interest in starting a French Reading group. We might meet in a member's home once a month to discuss, in French, some French literature, that we had agreed to read during the previous month. Or we might do some other form of reading that we have yet to discuss. If this or something similar sounds of interest, please contact me.

Name phone number email

Attendance Register

All attendees are to be paid up or prospective members of U3A Carrick

X = attendance

Group Leader, if you unsure that an attendee is a member of our U3A please check with the Membership Secretary



THE UNIVERSITY OF THE THIRD AGE

Accident Report Form - U3A Carrick

Name of Injured Party / Address / Phone Number:

Name / Address / Phone Number of other involved:

Date & Time of Accident:

Location:

Nature of Accident / Circumstances:

Injury Details / Property Damage:

Name / Address / Telephone or person causing injury / accident:

Witnessed by:

Address:

Phone Number:

Action Taken:

Was Specialised Assistance required at Scene? If so, give details:

Was Medical Advice sought afterwards? If so, give details:

Name of Group Leader:

Telephone No:

Signed:

(Group Leader)

Date:

Please pass completed form the Groups' Coordinator for processing.

Group Coordinator contact details are in the newsletter

Venue Risk Assessment Checklist

U3A Name	
Interest Group	
Date	Location/Postcode
Description of Activity	

Hazard		Yes	No	N/A	Comments
1	Is the access suitable for the group attending the activity especially anybody with limited mobility?				
2	Is wheelchair access adequate?				
3	Is the area free from obstructions & trip hazards?				
4	Are there adequate means of escape in an emergency?				
5	Are there appropriate direction signs to aid escape?				
6	Is there a Fire Alarm?				
7	Is there Emergency Lighting?				
8	Is there a designated assembly point? Where is it?				
9	Is there an emergency procedure for the building? Do you have a copy?				
10	Is seating always laid out? Is it a U3A responsibility before and after the activity to lay out seating				
11	Is there a kitchen? Is the kitchen adequate and hygienic? Are food safe cleaning materials available? Has the kettle been visually safety checked?				
12	Are the toilet facilities adequate & accessible?				
13	Is equipment being brought to the venue? Has it been checked?				
14	Is there a First Aid box and if so where is it located?				
15	Does it have a sound system with an induction loop?				
16	Other (define)				

Additional information:

Signed	Dated
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Venue Checklist (Day of Use)

U3A Name	
Interest Group	
Date	Location/Postcode
Description of Activity	

Check		Yes (✓)
1	Emergency Exits unobstructed	
2	Emergency Exits unlocked	
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	
8	Refreshment items available	
9	First Aid equipment accessible	
10	Safety Briefing given a. Emergency exits b. Assembly point c. What to do if fire discovered d. What to do if the alarm sounds e. Accident / injury reporting f. Toilet and washing facility location	
11	Other (specify)	
12	Other (specify)	

Notes

Signed	Dated
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Walk Leader Risk Assessment Checklist

U3A Name	
Interest Group	
Date	Walk Name
Distance	Terrain Type

Before the walk		Yes (✓)
1	Provision of information to prospective walkers: a) Location b) Distance c) Timing d) Linear / Circular Route e) Terrain f) Height and climbs involved g) Level of fitness required h) Appropriate footwear & clothing i) Toilet / refreshment facilities en route j) What to bring – food / drink / compass / map / mobile phone k) Dogs permitted? l) Meeting point m) Public transport options n) Car parking facilities o) Need of walkers to bring emergency telephone numbers for next of kin and relevant medical details	

On the day		Yes (✓)
1	Check first aid kit & emergency blanket	
2	Briefing before starting out: a. Route b. Duration c. Terrain d. Known Hazards e. Emergency Arrangements – illness, exhaustion, accident, weather problems, terrain problems, lost contact with group f. Be prepared to advise inadequately equipped walkers not to go but they must make the final decision	
3	Appoint a backmarker	

During the walk		Yes (✓)
1	Stay at the front but make sure you can always see the backmarker	
2	Set an appropriate pace for the level of walk	
3	Check the route frequently	
4	Periodically count the number in the group	
5	Other(specify)	

Signed	Dated
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