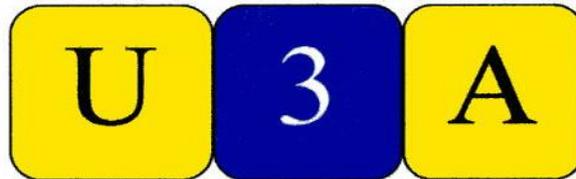


Countesthorpe



THE UNIVERSITY OF THE THIRD AGE

# **Group Leader's Handbook**

## STARTING A U3A GROUP

Perhaps you'd like to join up with a few like-minded people to do something that is not on offer, but you feel apprehensive at the thought of suggesting a new group in case you 'get lumbered' with a lot of work and responsibility?

If so, then read on . . .

Firstly, the key principle of the U3A movement is self-help – so basically, we do things together for ourselves and our members. No one else is going to step in and offer to do things – it's up to us, and if we don't do it, then it won't happen!

Secondly, you don't need to have any experience of 'running things' as there are enough people to provide guidance and support, especially when setting up a new group. The committee can help with information or start-up funds (if you need to buy some equipment, for instance).

With the help of the Groups Co-ordinator information about your new group can be pulled together and presented in the standard format (which keeps things simple for our members)

Getting 'the news' out is simple! Your activities can go in the monthly What's On, and on the three-times per year Activity Groups List, with additional information and promotion in the bi-monthly Newsletter and on the website. You, or someone else, can also stand up after the speaker at the monthly general meetings to tell everyone about the new offering.

So, if you have the beginnings of an idea, talk to the Groups Co-ordinator or go to the Contact Us page on the website. A quick chat will let you see what is involved in relation to your specific suggestion, and get the ball rolling!

But the key thing to remember is – this is fun – not an onerous burden!

## INTRODUCTION

The following guidelines have been designed to help you in the management of your groups, and in your role as part of the Countesthorpe U3A. There is more detail and links to National Sites on the Countesthorpe U3A website at [www.countesthorpeu3a.co.uk](http://www.countesthorpeu3a.co.uk)

### Each group should have

- A Leader
- A deputy leader/assistant who works in conjunction with the leader and is fully involved in the workings of the group

### New groups

To set up a new group, the Groups Co-ordinator should be notified of the intention to form a group, and the committee should give approval before the group is formalized.

## **Group management**

As a group leader, you are not expected to do everything for the group. Your key role is to act as a contact point between your group and the committee; your key tasks are shown below. These tasks can be shared with group members.

- Group leaders should keep a record of their group membership numbers and their attendance.
- A visitor from another U3A may join a group for an affiliation fee of £6 (currently) payable to the treasurer
- Group leaders should explain to group members the requirement for membership and about any financial contributions that will be necessary
- Group leaders should attend group leader meeting and disseminate any further information obtained there to group members

## **Group size**

Each group should determine its own size. Group leaders should be prepared to help set up a new group when appropriate

# **STARTING UP A NEW GROUP — SOME PREPARATORY CONSIDERATIONS**

## **Time and place**

The leader needs to think carefully about which day and time of day the group should be held, and the venue needs to be selected carefully. It may be possible to hold the group meeting in a member's home, or otherwise in a centre that other groups already use. The Groups Co-coordinator can be consulted about possible venues and timing. Access for disabled people also needs to be considered. See **POSSIBLE LOCAL VENUES FOR U3A GROUP ACTIVITIES**. Please be aware of the times, dates and venues of other U3A groups. These are available on the Countesthorpe U3A website

## **Goals**

The group leader needs to have a clear idea about their goals. What do they want to achieve? What do they expect themselves and the other members to get out of the group?

We would like to:

- Share and exchange ideas in a friendly and tolerant setting
- Try out new ideas
- Become more confident
- Participate fully in deciding what to include in programmes.
- Participate fully in group sessions
- Become supportive of each other
- Have fun!
- Make friends

When the goals have been decided the leader is in a better position to decide how to achieve them. Ideas may include:

- Devising ways in which all group members will become involved in activities
- Ensuring that there is time for members of the group to chat informally to each other and meet new people — perhaps while having tea
- Sharing thoughts about the goals for the group and collecting members' ideas
- Helping the group to shape some guidelines for the way in which sessions will be conducted.

**There are some resources available for loan to all groups.**

- |                     |                     |
|---------------------|---------------------|
| • Digital Projector | • Radio Microphones |
| • Projector screen  | ○ Head set          |
| • Laptop (XP)       | ○ Stick             |
| • Laminator         | ○ Lapel             |
| • Flipchart         |                     |

### **Monthly meetings**

At monthly meetings you are asked to collect and wear a badge that will identify you as the leader of your group. This will enable new and changing members to know who to approach if interested in joining the group. You, or a member of your group, may also be asked to make a three/four minute presentation about your group at the monthly meeting.

## **INSURANCE**

In your group activities you are covered by Public Liability Insurance. This covers U3A members for loss due to accident injury to a person or accident 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. Details of the insurance policy are available on the U3A national website at [www.u3a.org.uk](http://www.u3a.org.uk)

Anyone giving lifts to fellow U3A member will be covered by their own motor insurance in the usual way.

## **GUIDANCE ABOUT FINANCE FOR GROUP LEADERS/EVENT ORGANISERS**

Countesthorpe U3A is a registered charity and these guidelines are to ensure that we comply with Charity Law and also advice from the Third Age Trust, our umbrella organisation.

### **New Groups**

- Groups should be self financing but help is always available from general funds to cover the initial set up costs of new groups.

### **Equipment**

- General funds are also available for the purchase of equipment for new and existing groups.
- Forms are available for group leaders to complete, to obtain Committee approval, for any purchases. Please obtain authorisation before purchasing. The forms are held by the Groups Coordinator and the Treasurer.
- All equipment is the property of Countesthorpe U3A and is insured to be kept in group leaders' homes or secure outside premises. It would be helpful for the Treasurer to be informed where any property is moved from its original location.

### **Holding of Funds**

- It is strictly forbidden for individual group leaders or organisers of events to hold U3A funds in their own name in a bank or building society.
- Where groups or individuals within a group wish to run events there is a Countesthorpe U3A Group Account which can be used. This account is operated by the Treasurer. Simple, accurate records of income and expenditure should be kept and passed to the Treasurer together with monies. Where a cheque is required to pay for an event, ensure at least 10 days' notice is given to the Treasurer so that it can be made available in time for the event.
- Small weekly collections can be held in cash by group leaders to pay for refreshments etc during meetings.

### **Hire of Accommodation, Transport or Equipment**

- It is recommended that the cost of all premises rented for U3A activities should be paid for through a U3A bank account. This is to ensure that any contracts created are with the U3A and not individual group leaders/event organisers.

### **Paying for Tutors**

- It is not recommended to pay a member or a non-member to run a group as this can lead to problems with employment law and the tax authorities. It is not considered part of the ethos of the U3A movement as everybody is both a teacher and a learner. You can pay expenses such as traveling costs and extra insurance (if this is applicable).
- Occasional speakers can be paid a fee, which should be self-financed within the group, plus any expenses as appropriate

### **Claims for Expenses**

Group Leaders are encouraged to claim legitimate expenses incurred solely in connection with their U3A role, by submitting to the Treasurer a completed claim form supported by receipt(s).

Should you have any queries at any time please contact the Treasurer on telephone: 284 9959 or by email: [susanvwyllie@hotmail.com](mailto:susanvwyllie@hotmail.com)

## **CHECKLIST AND GUIDE LINES FOR GOOD PRACTICE FOR DAY VISIT ORGANISERS USING PRIVATE COACH TRAVEL**

### **Planning Stage**

1. Telephone proposed venue to check opening days, times, group entry rates, catering facilities, appropriate amount of time at venue and (if required) Guide prices and number of visitors per Guide.
2. Decide on a suitable date
3. Check AA web site for best route
4. Telephone or email bus company for quotation – give date, venue, likely departure and dropping off point/s, departure times at beginning and end of day and size of coach required (in the case of Robinson's 29, 49 or 53-seater – tel 01455 613925, mobile 07778 255525, email enquiries@robinscoaches.co.uk)
5. Estimate tour price based on a few spare seats on the coach and including driver's tip.
6. Prepare notice and participation list – give dates, price and what it includes, estimated departure and arrival times and pay-by date. (Remember to leave a column for participant telephone number).

### **Prior to day of visit**

1. Prepare a list of participants together with their telephone numbers
2. Collect fares and pay in to appropriate account
3. Confirm the coach (including size with coach company)
4. Confirm numbers with venue and likely arrival and departure times
5. Arrange car parking with Village Centre – 277 9518 (Mon-Thurs am)

### **Two days prior to visit**

1. Telephone bus company (agree exact route, stops and departure times)
2. Telephone venue, confirm visit and ascertain arrival procedures.
3. If leaving early phone Village Centre to check car parking arrangements

### **Visit day**

1. Take with you your mobile phone, list of participants and their telephone numbers, telephone numbers of bus company and venue, cheques for coach and venue entrance and cash tip for driver (the route is also helpful).
2. Check participants on to coach and ensure you know the number of people travelling
3. Ensure the driver knows where to pick up, intends to take the route you have planned and is aware of planned stop/s.
4. When all participants are aboard welcome them on the trip, give the format of the day including what to do at arrival at venue, departure time and any other appropriate information.
5. On stopping at the services, agree departure time with driver and make an announcement.
6. Never leave any stopping point without checking numbers
7. Pay the coach driver and give him his tip.
8. Keep receipts – coach, entries, guides, etc

## **General**

1. Any service area stop, which is intended as a coffee break, should be at least 30 minutes (20 minutes is insufficient to negotiate the various queues, eg to get off the coach from the back, queue for coffee and often ladies' toilets). Any journey exceeding 2 hours should include a 10-minute comfort stop except in special circumstances, ie a plane to catch or if no service areas are available.
2. Liaise with appropriate bank account holder (e.g. Treasurer/Travel/Theatre), to obtain cash for the driver's tip and cheque for venue/s and coach.
3. If appropriate issue your mobile number to participants for use in emergencies.
4. Finally – local routes – do check that the driver is taking the arranged route *(in the past I have been asked to pick up in Whetstone when travelling south, discussed the matter with Mr Robinson and refused on the grounds it was out of our way, the U3A member paid for a taxi to Countesthorpe and then the driver went to Junction 21 and passed the bottom of her road)!*
5. Also avoid passengers making their own private arrangements with the driver on the return journey – *(on returning from a 3 day break, following a request from 2 passengers wishing to attend a meeting I arranged with the driver to drop off at Countesthorpe first followed by all the stops requested. Unknown to me, some members of the group made their own arrangements to reverse the order of drop off which resulted in the 2 who had originally asked advice missing their meeting by 10 minutes!)*

## **POSSIBLE LOCAL VENUES FOR U3A GROUP ACTIVITIES**

- Conservative Club (2 rooms early evening; 3 Tues, Thurs, Fri lunchtime)
- Cornerstones
- Village Hall – main hall and small lounge (with kitchen facilities)
- Methodist Schoolroom (also the chapel is possible)
- Bowls Club
- Cricket Club
- Scout Headquarters, Winchester Road
- Scout Hut, Countesthorpe
- Baptist Schoolroom
- Schools
- Countesthorpe College

# Countesthorpe



## EXPENSES CLAIM FORM

NAME ..... DATE .....

COMMITTEE MEMBER/ GROUP LEADER (delete as appropriate)

CLAIM DETAILS	£

FROM	TO	MILES	RATE (40p per mile)	£

<b>TOTAL</b>	
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Approved by ..... Date .....

Cheque No .....



**GROUP EQUIPMENT FORM**

**NAME OF GROUP** .....

**GROUP LEADER'S NAME**.....

**TELEPHONE NUMBER**.....

**DETAILS OF EQUIPMENT**

.....

.....

**ESTIMATED COST**.....

**GROUP LEADER'S SIGNATURE**.....

**AGREED BY COMMITTEE** .....(DATE)

**The Group Leader will be notified once the purchase has been agreed. The purchase will then be paid, or reimbursed, by the Treasurer upon receipt of a valid invoice/receipt.**

**PAID cheque no** ..... **Date** .....

**ALL ITEMS PURCHASED REMAIN THE PROPERTY OF THE  
COUNTSTHORPE U3A AND MAY BE REQUESTED FOR USE  
BY OTHER GROUPS**