



Group Leaders Handbook

Introduction to interest groups

Thank you for agreeing to organise an interest group. We are sure you will find it very rewarding, however, it might seem a bit daunting initially. This information is intended to provide advice and support with this.

U3A principles

The U3A ethos is based on three principles:

The Third Age Principle:

- Membership of a U3A is open to all in their third age.
- Members promote the values of lifelong learning and the positive attributes of belonging to a U3A.
- Members should do all they can to ensure that people wanting to join a U3A can do so.

The Mutual Aid principle:

- Each U3A is a mutual aid organisation, operationally independent but a member of the Third Age Trust, which requires adherence to the U3A movement.
- No payments are made to members for services to any U3A.
- Each U3A is self-funded with membership subscriptions kept as low as possible.
- Outside financial assistance should only be sought if it does not imperil the integrity of the U3A.

The first steps to forming a new group

Recommended steps to undertake:

- Agree the development of your group with the Group Coordinator/U3A Committee.
- Liaise with the Group Coordinator/Treasurer regarding the financing of the group and how this needs to be reported – where relevant.
- Consider what interest there might be in the subject perhaps by some informal

soundings.

- Consider what the aims of the group are – what are you hoping to learn/achieve/share by offering the group?

- Would the activities benefit from having a risk assessment completed for the group?

You should consider whether there are any risks that might occur as a result of the group's activities and, if you identify any, talk to the Group Coordinator who will advise you on risk assessment procedures. If you're unsure or want further advice speak with your Group Coordinator.

- Identify what you want to achieve from your first meeting.
- Organise an initial meeting and invite people to attend.

The first meeting

Recommended steps to take at the first meeting:

- Introduce yourself and the purpose of the group as you see it.
- Ask about the skills within the group.
- Agree the tasks that need doing to run the group and who is willing to support these
 - who is willing to help with the programme or keep the register.
- Agree, if relevant, the level that the group will be aimed at – beginners, improvers, advanced.
- Agree how the group will work – discussion, instruction, presentation etc.
- Agree when and where the group will run.
- Identify any accessibility needs that group members may have.
- Agree the costs for running the group and what members will pay.
- Discuss how group members will communicate with each other bearing in mind data protection concerns.
- Agree some ground rules e.g.
 - Be punctual
 - Listen to each other
 - Allow others to speak
 - Let someone know if you are unable to come
 - Agree to disagree amicably and be respectful to other group members
 - Every contribution matters
 - Have patience with and encourage those who are slower to learn

Feedback what was agreed at the first meeting to your Group Coordinator to finalise arrangements.

- On the U3A website
- By setting up a Facebook group or page
- Via social media

- In the U3A newsletter
- Via Sources or Sources Online
- At regional, network or local events

Policies and procedures

Your Committee and/or Group Coordinator will advise you of the U3A Insurance arrangements as well as policies and procedures that you need to be aware of. The Trust holds a licence to copy some materials for educational use within groups. If you are going to be using copyright material in any form, for example, printed, audio or pictures, please check with Brixworth & District u3a Committee for advice.

Problem solving

If a problem arises please talk to the Group Coordinator or Committee member.

Issues between group members

Please talk to the Group Coordinator or Committee member.

Accidents and incidents

Report all accidents and incidents to your Committee as soon as possible and complete an accident form. A template form is available Brixworth & District website. It is as well to have an accurate record in case of future problems relating to the incident. Remember that the Third Age Trust provides insurance for group activities.

Log book

It would be useful to have the following information.

- Contacts • Registers
 - Venue, timing, costs
 - Accounts where relevant

Interest Group - Financial Return
from 1st April 202_ to 31st March 202_

Name of Interest Group

Group Leader

Opening Funds as at 1st April 2020 - £ +

Total Income for the period - £ +

Total Expenditure for the period - £ -

Made up of -

Hall rents £

Purchases £

Photocopies £

Other £

----- £

Closing funds as at 31st March 202 - £

In order to comply with Charity Commission Financial Regulations the B&D U3A Committee has asked that all Group Leaders complete a Financial Return at the end of each calendar year. This return covers all your group's activities during the current year.

Tim Smith (Treasurer)

Signature

Date

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: | | | | |

Exceptional Circumstances

There may be reasons why additional conditions may have to be taken into consideration when completing this risk assessment.

When completing a risk assessment in exceptional circumstances you need to consider how this will impact on the activity, what additional measures or changes you will need to make for each identified hazard in order to reduce risks involved in running the activity. These changes will need to be incorporated into the assessment of how hazards can be reduced or avoided to respond appropriately to the exceptional circumstances you are facing.

Notes for exceptional circumstances:

Signed

Dated

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 <ul style="list-style-type: none"> 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) | |

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|--------------|
| Notes |
|--------------|

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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: <ul style="list-style-type: none"> a) Location b) Distance c) Timing d) Linear / Circular Route e) Terrain f) Height and climbs involved g) Level of fitness required h) Identification of any 'break off' points (e.g. if members feel unable to continue) i) Appropriate footwear & clothing j) Toilet / refreshment facilities en route k) What to bring – food / drink / compass / map / mobile phone l) Dogs permitted? m) Meeting point n) Public transport options o) Car parking facilities p) 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. Identify any first aiders. | |
| 2 | Briefing before starting out: <ul style="list-style-type: none"> 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) | |

Exceptional Circumstances

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Notes for exceptional circumstances:

| | |
|---------------|--------------|
| Signed | Dated |
| | |

FURTHER NOTES