



Buckingham and District U3A Guidance for Group Co-ordinators (GCs)

The U3A is dependent on its members for setting up and running groups. These notes have been written with the aim of supporting any member wishing to lead a new group as well as a reminder for existing GCs.

Setting up a group

The purpose of the U3A is to share knowledge, skills and experience and to meet the social needs of its members. The U3A relies on the enthusiasm of its members and on their willingness to involve themselves in groups.

A group can be established on any topic that interests those who wish to join. A group can be any size, although 6 and upwards is recommended and most will grow once established.

If you would like to start a group, speak to the [Group Liaison Officer](#) (GLO) who will arrange for it to be advertised on the website and facilitate the initial setup and first meeting. They will also assist you to identify a venue, if required.

Needs of a group

- A leader (GC) to co-ordinate/organise and encourage members to participate.
- An agreed programme.
- A regular time and place for meeting – a member's house or other public venue.

Types of Group

- A study group with a defined educational aim and a specific subject to learn about in a set number of meetings.
- A social study group with a definite educational aim but with no limit to the number of meetings.
- A social or activity group with no defined educational aim.

Gathering members

- The GLO will put a notice on the notice board at the monthly meeting and publicise in the newsletter and on the website.
- The GLO will announce your group at the next Open Meeting.
- The GLO will give advice on available venues. Public venues may require a hire fee to be paid, for which the members will be asked to make a contribution.



Group co-ordinators:

- The main function of the Group Co-ordinator (GC) is to make all the necessary arrangements for the group meetings, and to manage the group finances if appropriate. You should liaise with the [Treasurer](#) on this aspect, particularly if you want to use a paid venue. The members of your group will need to be asked to make a shared contribution to these costs.
- A GC may be an expert and choose to take on a tutorial role in addition to an administrative one, but this is entirely optional. The GC may also support and coordinate the learning and teaching which is shared between members of the group and/or arrange speakers or visits. Note that paid speakers do not normally fit within the ethos of the U3A, which is a collaborative learning organisation, affiliated to the aims of the Third Age Trust. See additional guidance.
- If a GC is also the group tutor it may be helpful for them to delegate some of the administrative tasks to another member. This can include, for example, using the email system set up to keep members in touch with the group. The Simple system allows for the appointment of a Group Buddy who can carry out such admin tasks on behalf of the GC.
- U3A members are covered by TAT Third Party insurance on trips in the UK and in mainland Europe; the cover is for U3A member to U3A member, and for U3A member to a member of the public. U3A Public Liability insurance **is not** Personal Accident insurance. It would have to be shown that the U3A, its agents, or members had in some way been negligent in causing injury to the victim. The [Secretary](#) will normally send out a copy of the cover note each January at renewal, but it can also be found in the GCs resources section. *Please see below on the topic of Risk Assessments.*

Running a group:

- The Newsletter and our website will provide a list for members to obtain details of groups and contact details for the GCs. The time of the meeting as agreed is published in the Newsletter and on the website Groups list, available on the Simple Membership site. Prospective members are asked to contact the GC via the group's email address for further information.
- GCs also have the opportunity to publicise their groups by updating the information on the GC's notice board (on display at the Open Meetings – see above), to speak at the monthly meeting or to request to attend new members meetings, and submit relevant information to the [Newsletter Editor](#) for publication, and to the [Webmaster](#) for the website.
- GCs should advise any changes of the time/venue of their meetings to the Group Liaison Officer, the Newsletter Editor and the Webmaster. Any cancellations of regular meetings should also be advised to the [Treasurer](#).
- GCs should inform the Group Liaison Officer of any changes in the group co-ordination arrangements, for example if the GC wishes to step down, or to appoint another group member or members to assist in running the group.



- Buckingham U3A has various technical items that are available for the use of groups (contact the [Technical Support Officer](#) for details, and to book the equipment). You can see a list of what's available and some guidance on setting up and using on the [Technical and PA Guides](#) page.
- A Register should be kept and attendance at each meeting recorded. GCs should request group members to provide details of Emergency Contact details, particularly in those taking part in physical activity and in those who have regular planned outings. These details are requested when a member first joins, and all members are asked to keep their profile up to date on the Membership system. Registers printed from the Simple system will include the emergency contact details for each group member. Members may choose not to give these details, but should be asked to keep them on their phone, or in a wallet/purse, in case of emergency
- With reference to the GDPR (General Data Protection Regulations) all membership data or personal information should be kept confidential and not passed on to anyone else (including other members within a group) without their express permission.
- GCs should always use blind copies (BCC) for addresses when sending emails from their Group email (using Roundcube webmail or preferably the Simple Membership system – note that the SM system automatically sends BCC) provided for them to communicate with members of their group.
- The information received from members should be kept securely on the GCs' PC or Laptop (particularly Emergency contact numbers) solely for their own use in running the group. Failure to adhere to these practices potentially breaches the GDPR and may lead to people receiving spam emails or unwanted phone calls, and even to prosecution.
- GCs should also be aware of the provisions of our Accessibility Policy, the Equality Diversity & Inclusion Policy, and the Member Code of Conduct (see Appendix for the Code of Conduct and website for the other Policies). Any queries or issues regarding these should be addressed to the GLO.
- Risk Assessment forms are available from the link below; please note that you will need to complete the appropriate form for a new group, and update it should any details change, such as the group using a different venue. This is a requirement of our U3A Insurance provided by the Third Age Trust. A copy of the Insurance cover note will be sent by the Secretary to every GC at the renewal date, usually in January each year; if there are any queries arising, please ask the GLO in the first instance.
- In the event of a member of your group suffering an Accident/Incident the GC should complete an Accident/Incident Report Form a copy of which can be found on our website. Completed forms should be returned to the [Secretary](#) as soon as possible, and copied to the GLO.
- GC's should ensure that, whenever possible, there is a deputy/shadow to cover or assist as and when necessary, in times of absence. See above



regarding appointing a Group buddy on the Simple system, who can carry out admin tasks as required.

- GCs should ensure that all group members are fully paid-up members of this or a neighbouring U3A by checking membership information on the Simple System, particularly when new members join the group. The system will send an alert message, should anyone in the group lapse their membership, and they will automatically be removed from the Register in that case.
- Making and distributing multiple copies of a copyrighted document is allowed for educational purposes within the remit of the CLA licence. A copy of the current Licence will be available from the website in the [GCs resources](#) section. The licence does not cover maps, newspapers or sheet music.
- The [Treasurer](#) ensures the Music performance licenses are kept up to date; you can ask any questions by email.

Guidance for Group co-ordinators on attendance of non-members at Groups:

As a general rule, non-members of the U3A cannot attend groups, group walks, outings and holidays etc. If in doubt, ask to see their membership card which may be shown on a phone or other device if sent by email.

However, in certain circumstances, occasional or casual attendance can be allowed:

- For Walking Groups and Social outings, it is possible for a non-member, e.g. partner/friend to attend **on an** occasional basis, but this should not be a regular occurrence.
- A carer for a disabled/elderly person can attend in their capacity as carer.
- A prospective new member may attend a group or outing as a one-off visitor.

In these circumstances only, non-members enjoy the same Public Liability Insurance as U3A members. The Policy is an insurance against the legal liability of the U3A and is **not** a personal Accident Insurance. The up-to-date cover note received from the Third Age Trust will be emailed by the Secretary to all Group Co-ordinators when available, normally at the start of each year. Some venues or organisers may request sight of this document when booking.

Group Finances

- **General:**

The charitable status of the Buckingham & District U3A means that each GC must keep cash handling to a minimum, and keep financial records. Members of



the group should have access to these records at any reasonable time and the GC must provide the members and the Treasurer with a copy of the Group's accounts made up to 30th September each year.

Charitable status also means that the Committee has total responsibility for ensuring safe custody of members' money, and the Trustees are the only people with legal accountability.

Groups should be self-financing including hire of a venue. The GC should arrange the hiring of a venue, and inform the Treasurer of the charges involved.

- **Income:**

Except where meetings are held in members' homes or in a free venue, GCs should collect from each member a contribution towards the cost of the rental of the venue. Once it has been discussed with the Treasurer, payments should be made either by Bank transfer, or a personal cheque, or by cash to Buckingham & District U3A as advised.

The provider of the venue will be paid at the end of each month by the Treasurer on behalf of the U3A. The GC or their representative must keep a financial Register of all those attending, monies received and dates. *Note that the Simple system can be used to record Group Finances including number of attendees and payments received; further details are available from the GLO on request.*

For clarity, where meetings take place in a member's home, the Buckingham & District U3A has no interest in any arrangements made to cover the cost of any refreshments provided to the group members.

If money is collected for purposes other than the hire of a venue, any amount in excess of £50.00 should be paid to the Treasurer, who will hold it on behalf of the group for planned future expenses.

Please note – self-financing groups must never open a Bank account, never apply for a grant or put members' money into a personal account.

- **Outgoings:**

In addition to the hire of a venue, other costs should be kept to a minimum. These other costs may include fees for speakers, postage, photocopying, etc. A speaker who is also a U3A member cannot receive any payment for their talk.

For an item of equipment deemed necessary to run the group, an application for funds may be made to the Committee. If approved and purchased, the item



would then be put on the Buckingham and District U3A Asset register held by the Technical Support Officer or Treasurer, and remains the property of the U3A.

GCs Expenses

GCs should not be out of pocket in relation to the running of the group. Expenses must be covered by additional contributions from each of the group's members.

Car sharing is in order. The car owner can charge a share of the cost at up to 40p per mile. Insurance policies are not normally invalidated, but the car owner should make sure to check this with their own Insurance Company.

If any trip or holiday organised by a GC includes the offer of a free place then the GC may, if they wish, claim one free place per year, and half the value of a free place for any subsequent trip or holiday. Where the cost is shared between participants, for example on a coach trip, the GC must pay their full share.

Support for GCs.

The role of the Committee through the GLO is to ensure, as far as possible, the smooth running of the groups, and to offer support and advice to GCs.

From time to time the Committee will ask each GC for an update on the group progress, and discuss any issues with them. Any problems arising can be discussed with the Committee for advice, at any time.

A meeting of GCs is held once a year, normally in February or March. This is a good opportunity to meet with others and share any successes or problems.

GCs will find a set of [resources](#) available on our website which includes the handbook, how to guides for the Simple system, Finance FAQs, and copies of the TAT Insurance cover-note and CLA Licence. There are links from that page to the Risk Assessment forms and to the Technical Support area with full details on what is available and how to book, with additional guidance on setup.

There is in addition a Network of Subject Co-ordinators available on the National U3A website which includes numerous [resources](#) on specific subjects, for you to browse and download as required. You will need to create an account and login on first access in order to download resources for your group. See the Appendices for more ideas.



Our Policies on Accessibility and Diversity are available from our site and will advise you on how to deal with various situations, for example how to facilitate a disabled member to attend the group.

Note that each member agrees on their application form to abide by a **Code of Conduct** which includes the specific items mentioned in the attachment at Appendix.

Our [Data Protection Policy](#) is available from the website, and the Code of Conduct and other published policies are also available from the same page.

Examples of [Risk Assessment](#) forms and Incident report forms can also be obtained from our website – see above link to GCs Resources which includes Insurance information. It is advisable to complete the initial Risk Assessment before using the venue, and update for each subsequent meeting as appropriate, for example if the venue changes in any way. Should an incident occur then you will need to complete an Incident Report form and send it to the Secretary as soon as possible.

If you have any further queries on any of the specific aspects of running your group, please address these to the [Group Liaison Officer](#) in the first instance, and they will help you to resolve these as soon as possible.

See the Appendix for more useful information on setting up and running a group, as well as a copy of the Member Code of Conduct. All members have agreed to abide by this code when submitting their joining application. This applies both to online and paper-based applications.



Appendices:

Running a Group:

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. Refer to our Accessibility Policy and speak to the GLO if there are any queries.
- 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 Liaison Officer, to finalise arrangements.

Participative learning and learning styles:

'Tell me and I forget. Teach me and I remember. Involve me and I learn.'

Benjamin Franklin

'Every accomplishment starts with the decision to try'. Anon

The value of the U3A style of learning is that everyone can contribute and by doing so will gain a feeling of self-worth and integration. We all learn in different ways.



Variation in content, method and style can make the learning experience more vibrant and appealing. Many of us will have particular skills but most of us will use a combination of the following: -

Visual: using pictures, diagrams, images and spatial understanding.

Verbal: using words – both spoken and written.

Auditory: using sounds, rhythm, music, spoken presentations.

Physical/kinaesthetic: using hands, body, senses and acting things out.

Logical/Mathematical: using logic, systems, sequences, data, statistics.

Social: learning as part of a group, sharing experiences and explaining your understanding to others.

Solitary: studying on your own.

Consider the following options:

A visiting speaker: A one-off visiting speaker, non-paid tutor or someone from another interest group or U3A.

Group member presentations: A short presentation by a member of the group or a member leading the meeting on a specific topic.

Discussion groups: Some activities will lead to discussion e.g. 'What the papers say', 'Which way does water go down the plug hole – and why?'

Project based: A project chosen by the members. Each person (or pair) allocated an area of research which they bring to the group. This can be a good way to learn new technology.

Practical work: This might lean towards specific subjects such as science, craft, photography, creative writing, story-telling.

Drama: Create a short sketch. Provide some entertainment for your monthly meeting.

Themes: Have an event or presentation linked to a specific topic.

Liaise with a school or community group: For Example, a local history presentation, art exhibition, debate.



Liaise with other organisations: Museums, universities, libraries. Very useful for Shared Learning Projects.

Shared Learning Projects: These are opportunities to work on short term projects with other U3As or outside organisations. They usually involve research and have a definite outcome.

Study days and workshops: Plan one for your own members or as part of a local network. E.g. Family History Day, Language day, Story-telling workshop, debate, quiz, music.

Online learning: MOOCS (Massive Open Online Courses), YouTube 'How to' videos, Future Learn.

Help and support Resources:

Subject Advisers: Trust volunteers with specialist knowledge in a wide range of topics. Contact details on the National Website and in Third Age Matters.

External organisations: Museums, libraries, schools, universities.

U3A publications: Check the national website for the latest publications.

Networks, regions, neighbouring U3As: allow you to draw on experience from within the movement.

Other learning opportunities:

- Shared Learning Projects and Shared Learning Project Coordinators – contact details available from the national website
- National and Regional Summer Schools
- Events facilitated by National Office
- National, Regional and Network Workshops and study days
- Outreach departments of universities

Problem solving:

Sometimes issues can arise within a group that disrupt the smooth running and spoil the enjoyment for everyone. Don't leave a problem too long before trying to resolve it.

Talk to your Group Liaison Officer or a Committee member, if you are unsure how to resolve the problem or just want someone to explore options with.



Issues between group members:

Where there is potential for friction, it is advisable to begin by bringing it into the open. Either you or another person could try to facilitate a discussion, either with the members concerned, or with the whole group, but it is important that the facilitator remains neutral and non-judgemental.

If you cannot reach a resolution informally, speak to your Group Liaison Officer or a member of your Committee.

If a situation does not resolve and becomes acrimonious, your Committee can consult the advice on disciplinary procedure provided by the Third Age Trust. There are also Trust Volunteers trained to support with resolving disputes.

Accidents and incidents:

Report all accidents and incidents to a member of your Committee, as soon as possible, and complete an Incident Report form. A template form is available from the website.

It is as well to have an accurate record in case of future problems relating to the incident or accident.

Remember that the Third Age Trust provides insurance for group activities. For some groups you may consider it necessary to ask members to hold or provide Emergency contact details.

The Simple Membership system allows members to add this information to their individual profile, and these will appear on the Group Register once generated by the system. Please refer to our Data Protection Policy if there are any further queries.

(2). Member Code of Conduct:

As part of the Terms and Conditions of their Membership:

- Members are expected to know, follow and promote the Principles of the U3A Movement at every opportunity.
- Members must always act in the best interests of Buckingham & District U3A and the U3A Movement, strive to uphold its reputation and never do anything which could bring their own, another U3A or the U3A Movement into disrepute or expose it to undue risk.



- Members are expected to use Buckingham & District's resources responsibly and only to further its stated charitable objects/purposes.
- Members are expected to reflect the current organisational policy of Buckingham & District U3A, regardless of whether it conflicts with their personal views.
- Members are expected to abide by Buckingham & District U3A's procedures and practices as set out in the terms and conditions of the Constitution.
- Members are expected to treat each other with dignity and respect at all times.
- Members are expected to comply with and support the decisions of the elected Committee.
- Members agree with the terms and conditions of Gift Aid when submitting their application form.
- Members should advise the Committee of any changes in their personal details and keep their profile information up to date.