

Craven u3a Group Leaders Guidelines

Without volunteer Leaders there would be no Craven u3a. Your skills and experience enrich our local community and make it a better place to live.

Thank you for what you do particularly your commitment and enthusiasm.

You: exert a positive influence over members' well-being and quality of life

- enrich our local community and make it a better place to live
- are the public face of the u3a

Group Leaders advise - the document which gives advice on:

- Members with disabilities
- Venue matters
- Copyright issues
- On-line and other resources
- Guidance on the handling of venue charges

Craven u3a Committee, contact details and role descriptions see u3a website under '*Committee Matters*' drop-down menu.

1. Group Leaders: practical points

Group Leaders:

- are volunteers and do not receive any payment but are entitled to a discounted membership fee.
- are represented by a member of the Craven u3a Committee, (Mick Richings, mick.richings@btinternet.com) who should be consulted first with any general query or suggestion which may need committee consideration.
- publicise their groups in the Newsletter and meet prospective group members at the Craven u3a Open Event held at Skipton Town Hall in August each year.
- are invited to Group Leaders' meetings, held at least twice per year to discuss issues affecting them
- are expected to operate within rules and policies of Craven u3a, and in a manner that maintains and enhances its reputation; remembering you are the public face of Craven u3a.

Note: Each group can only have one nominated leader.

2. Group Leaders and groups

Members join our u3a to take part in groups. The benefits of membership such as getting people out and about, promoting mental health and kindling and sustaining friendships accumulate over time. It can be well said that groups are the beating heart of the u3a. It follows therefore that Group Leaders are a good deal more than 'mere' organisers.

a) The Craven u3a programme

The annual Craven u3a programme lists details of every group. The Groups Coordinator is responsible for producing this key document which is designed to help members finalise their choices of groups. This is a multifaceted operation requiring close cooperation between the Groups Coordinator and Group Leaders.

At the beginning of March, the Groups Coordinator will ask all Group Leaders to provide details of their course for the following u3a session, which will begin as of the end of September (see the simplified flowchart of the process below). That information having been collated, Group Leaders will receive two or three drafts of the programme, and it is their responsibility to check that their entry is correct in all respects.

Group Leaders are asked to meet deadlines for information on their groups as requested by the Groups Coordinator. They should check their group descriptions and timetables as soon as they are received. Any errors and amendments to avoid misunderstandings should be promptly communicated to the Groups Coordinator.

Starting and finishing dates and half term (if any) are determined by each Group Leader. Please note that Craven u3a encourages experimentation with formats e.g. fortnightly meetings, short courses (i.e. less than 10 weeks), as well as alternation between in-door and outdoor activities.

b) Group activities.

Group Leaders are encouraged to organise outings and trips, as these can increase interest as well as social involvement. However, they should not use their own bank accounts for any monies (See item 5 below 'Group Leaders and expenses'). These trips should be optional unless advertised as an integral part of the group.

Group Leaders using indoor venues often organise a refreshment break halfway through each class. Facilities are available for tea/coffee making at most venues. You should encourage group member participation in the organisation of this by seeking volunteers to organise refreshments, washing up, collecting money for materials etc., and setting up and restoring tables and chairs. The 'Organiser' should provide tea, coffee, sugar, milk and biscuits, and levy a charge to offset the cost. Some groups donate unused coffee break profit to an agreed charitable cause. **The 'coffee money' is controlled by the group and should NOT go through the Treasurer.**

Where Group Leaders cancel a meeting because of illness, weather or another reason, it is their responsibility to contact all group members and advise them of the cancellation or to arrange for group members to assist in the contacting. Inform the venue know of the cancellation and inform the Venue Secretary and Treasurer.

c) Handling group enrolment, reserved places and waiting lists

These recommendations with respect to group enrolment, reserved places and waiting lists. Have been developed in consultation with Group Leaders during 2023 and 2024 and drawn up to be of practical use to Group Leaders and meet the following criteria:

- They support the u3a ethos.
- They counter perceptions of unfairness (including among new or prospective members) and lack of inclusivity.
- They are acceptable to Group Leaders but allowing them discretion. This last point is important because some recommendations simply cannot apply to certain types of groups. For example, the recommendation for waiting lists below has no relevance for some but not all the walking groups!

Group enrolment

Group Leaders are expected to be responsible for members' enrolment and to decide how to manage reserved places. Enrolment will not take place at the Open Event, but at a date somewhat later as determined by the Groups Coordinator. Between those dates (in July and August) enrolment help, including help sessions, will be available. Group Leaders have priority joining one group of their choice. Where applicable (e.g. on session-based courses), groups may enrol over their maximum number, as it is rare to get 100% attendance.

Reserved places

This is a fraught issue, as some Group Leaders are against the reservation of places in any circumstances, whilst others find it acceptable to have up to 25% of places reserved. By their nature language groups are relatively small-sized and many of their members prefer to continue from one year to the next. Furthermore, groups that take place in the Group Leader's home are automatically limited in size. In fact, only a relatively small number of groups exercise reserved places for what they regard as good reasons. In these cases, the Group Leader's judgement should be respected in the case of reserved places. The view of the committee is that our groups should be as open as possible to new members because that fits the u3a ethos. Group Leaders, who are in doubt, should seek the advice of the Group Leader Representative.

Waiting lists

If an enrolled member does not attend the first three sessions without giving apologies, they are to be removed from the group and their place given to the first person on the waiting list. In the case of those groups to which this recommendation can be readily applied, Group Leaders should make this stricture clear in their initial communication with the group. Where applicable, Group Leaders are entitled to expect that the individual member will attend most sessions.

d) Visitors

Visitors to u3a Groups see Committee Matters > Policies > Visitor Policy,

e) Publicising your group

Group Leaders are encouraged to publicise their group in Craven u3a's on-line Newsletter. They can also submit photographs to the webmaster for publication on the Craven u3a website. The e-mail address is website@cravenu3a.org.uk. Please note that photographs can only be published with the permission of the people who appear in them. This is a requirement of GDPR (General Data Protection Regulations).

f) Communication with members

Group Leaders are requested to respond to every call and email from members. If a member raises a matter which causes you uncertainty, you should contact the Group Leader Representative.

3. Beacon

Beacon is the u3a movement's integrated membership, groups, finance and mailing system. It also allows you to keep in touch with your group as well as with individual members.

Group Leaders must become familiar with using Beacon, training will be provided as required.

You can then input or change the information that you want to appear and the dates and start time of your group. Remember: if you change these, let the Groups Coordinator and Venues Secretary know. Under Members you can see your group's membership list, which you can download. You may use this list to send them emails.

If, after enrolment, a change must be made (e.g. concerning a start date or venue), each Group Leader is responsible for notifying group members accordingly. Group members should be telephoned with any urgent information, rather than depending on email where there is no confirmation of quick receipt. Any changes should be notified to the Groups Coordinator and the Venues Secretary.

Group Leaders should check attendance against the list of group members at each meeting of the venue-based groups. Where the group has a waiting list and there are spaces available because of 'no shows' the Group Leader should contact these people to determine if they do intend to take part. If not, the Group Leader should invite people from the waiting list and advise the Groups Coordinator so that the group records can be amended.

4. Advice to Group Leaders on Handling Money

The Third Age Trust has provided advice to all u3a about 'handling money and payments in u3as'. The members of the committee of Craven u3a are the trustees of that charity and are responsible for the proper handling of all funds of our u3a. Minor expenses such as coffee money, payments to a restaurant, theatre tickets etc. should NOT be referred to the treasurer.

a) Group costs might include consumables such as hand-outs, photocopies, playing cards, board games as well as charges for the purchase or hire of equipment or materials. These costs should be advertised prior to enrolment. Group leaders are entitled to levy a charge on their members. Groups can collect such sums of money as the group members and leadership deem to be necessary to undertake their activities. Group leaders should keep records of their group's transactions in order to:

- Allow the group members to understand how their monies are being managed;
- Maintain transparency and trust for all concerned;
- Minimize the risk of error and potential loss of funds;
- Allow group leaders to maintain small cash floats;
- If asked by the Craven u3a treasurer, be able to show how money was collected and spent.

The arrangements and use of any money collected by groups should be explained to the group members and the Craven u3a treasurer.

b) Group venue charges

In 2023 Craven u3a instituted a system of group venue charges. These reflect the additional costs associated with groups using venues, providing fairness to all members. Guidance on the handling of group venue charges is provided in **Appendix 1**.

Group leaders dealing with large sums of money (£500+) for trips etc. should NOT use their own bank accounts, nor set up a separate account on behalf of the group. Group leaders should seek advice from the treasurer who, if deemed appropriate, will make arrangements for the Craven u3a account to be used.

c) Travel activities

Leaders may organize field trips and outings to suitable subject areas. This should be encouraged as it increases interest and social involvement.

Where a group organizes holidays, members' monies should be paid directly to the Craven u3a account. The Craven u3a treasurer will allocate such monies to the group and will arrange payment of invoices in association with the group treasurer. The group treasurer should keep records of payments received and disbursed. The Craven u3a treasurer will confirm with the group treasurer the balance held in the group's account, periodically and at the year end.

d) Donations

Group leaders are reminded that any money received or collected by their group as donations to charities should be paid directly to those charities and not to the Craven u3a. Receipts should be obtained and retained by the group.

5. Advice to Group Leaders on dealing with group member behaviour

The behaviour of individual group members may, on occasions, cause problems for both other group members and Group Leaders. It is recognised that the success of Craven u3a is dependent upon the expertise and goodwill of the Group Leaders, who give their time and experience freely. The Committee will give maximum support to Group Leaders to ensure that they and their groups have the most enjoyable experience possible.

If problems occur the following action is recommended:

- 1.** The Group Leader should take the member on one side and inform them that such behaviour is unacceptable as it interferes with the well-being of the group. It is emphasised that an early word is likely to have the best results.
- 2.** If no improvement occurs then the Group Leader should inform the member that if the problem persists, they will be referred to the Committee if the situation does not improve.
- 3.** Group Leaders should NOT bar a member from their course. The Craven u3a Chairman should be informed and will take the following action:
 - a)** A Committee member will contact the group member concerned and warn them that a continuation of their present behaviour will result in the termination of their membership of the group.
 - b)** The final stage, if (in the view of the Group Leader) there is no improvement, is for the Committee, following an opportunity for the group member to a hearing, with a view to terminating their membership of Craven u3a.

For more information see Complaints and Disciplinary procedures on the website under policies.

Appendix 1

Guidance on the handling of venue charges

The group venue charge should be taken from members at the first class they attend. It is a good idea to ask a member of the group to manage these payments so that group leaders can concentrate on running the class. You should keep a record, for your own use, of the members who have paid. When you have collected most of the money, please pay this into the Craven u3a account with Barclays in one of the following ways:

1. Cash can be paid into a post office, using a business deposit card. The cashier will count the cash, ask you to put the card into the machine, confirm the total and you will be given a receipt. Please take a photograph of the receipt and send it with the group name to treasurer@cravenu3a.org.uk
2. You can keep the cash yourself and pay the u3a by *BACS* from your personal bank account. Please enter the name of the group - abbreviated if necessary - as the reference. Please also keep a record of such payments for your own protection. If possible, please take a screenshot of the transaction and send it with the group name to treasurer@cravenu3a.org.uk. Otherwise, an email with the date and amount of the transaction will suffice.

The bank details are:

The Craven u3a
20-78-42
83984230

3. Payment by cheque should be discouraged. If you do receive cheques, they can be paid into the post office. You will need a paying in slip and deposit envelope, which can be obtained from the treasurer.

If you receive additional payments, you can keep these until your final meeting and pay them in then.

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