

## Group Leaders Guidelines – Additional Advice

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### 1. Group Leaders and Money

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 groups' transactions in order to:

- Allow the group members to understand how their monies are being managed.
- Maintain transparency and trust for all concerned.
- Minimise the risk of error and potential loss of funds.
- Allow group leaders to maintain cash floats.
- If asked by the Craven 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 MEMEBERS AND TO THE CRAVEN u3a TREASURER

(See **Appendix 1**)

### Group Venue Charges

In 2023 Craven u3a instituted a system of group venue charges, which is reviewed and set by the committee. Collecting the charges and banking the proceeds is the responsibility of Group Leaders.

See **Appendix 2 Guidance** on the handling of venue charges

### Group financial issues and Insurance.

Please note that all Group Leaders are covered by Public Liability Insurance through the Third Age Trust that oversees u3a activities nationally. Please contact the Chair if you have any concerns about the extent of this cover.

## 2. Awkward Situations

Occasionally, situations arise which cause Group Leaders uncertainty or problems. For general queries, you should contact the Group Leader Representative. In the case of specific issues to do with venues, membership or Beacon, contact the respective committee appointee. In the case of serious problems, which might involve an external body such as the police or social services, you should contact the Chair.

### a) Dealing with difficult group members

The behaviour of individual group members may, on occasion, cause problems for Leaders as well as other group members. 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 the problem still persists, and it will be referred to the Committee if the situation does not improve.
3. Group Leaders should NOT bar a member from their group. Craven u3a Chair 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 could 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 have a hearing, to terminate their membership of Craven u3a.

## 3. Members with disabilities

- a) As part of the enrolment process members will be advised that, if they are worried that a disability or health problem (including memory-related ones) might be an issue, they should contact the Group Leader to discuss it. Leaders may be contacted by a member's carer to see if the venue environment is suitable. Please **do not ask** the group if any member has any disabilities.
- b) Many people experience hearing loss as they get older, so please speak clearly and check, at the start of a session, that people can hear you. Some people with hearing problems lip-read (occasionally without knowing they are doing so,) so try not to turn your back to the group when you are speaking and make sure your face is not in darkness. Some hearing-impaired members may appear shy or not answer you – they are not ignoring you; they may not have heard you! (*advise is available on the website under Group Leader*)
- c) If there is a hearing loop at your venue make sure that it is switched on and inform the group.

## 4. Venue matters

Those Group Leaders who use inside or outside venues MUST confirm the availability and suitability of venues with the Venues Secretary before the Programme is finalised.

Craven u3a will pay accommodation costs for up to 20 meetings a year for each group with 10 or more enrolled members. Any additional meetings should be booked by the Craven u3a Venues Secretary so that the group is covered by the Third Age Trust Insurance. However, the cost of using the venue for these additional meetings will need to be met by the group, and the Group Leader is responsible for making the

appropriate payment to the venue owner. We do not pay for any materials or equipment specific to a particular group. If there are fewer than 10 in your group, we suggest meetings are held in someone's house in which case the small annual sum referred to above is paid.

Please check the venue before leaving to ensure that it is left in a clean and tidy state. Leaders with any concerns about their venue should contact the Venues Secretary and let the Group Leader Representative know.

**a) Risk Assessment Form and Incident Report Form**

Prior to the course commencing each Group Leader should obtain a risk assessment form, which can be found on the Craven u3a home page the completed form should be sent to the Venues Secretary.

In the unlikely event of an accident or injury to a group member or the Group Leader, the incident should be reported to the Group Leader Representative using the Incident Report Form, which is also to be found on the Craven u3a home page. Incident reports are to be kept for 3-years

## **5. Copyright issues**

The Third Age Trust holds a copyright licence which permits Craven u3a Group Leaders and members to copy extracts, within clearly defined limits from books, journals, magazines and periodicals published in most countries. You are limited to one chapter from each book, one article from a journal or magazine, a short story or poem not exceeding 10 pages from an anthology, or 5% of the publication if greater than the above. Note that the licence does not cover printed music (including words), newspapers, maps, charts, exam papers and various other categories. Craven u3a and the Third Age Trust hold licences that mean groups are allowed to show DVD's, videos & films (including copying & showing programmes from TV) for educational purposes, provided no separate charge is made to see them.

*Note: Craven Stationery, 22/24 Coach Street, Skipton offers a discount to the u3a for copying (mention Craven u3a)*

## **6. On-line and other resources for Group Leaders**

- a) The Craven u3a website (<https://cravenu3a.org>) has plenty of useful information for Group Leaders. For example, policy documents are available on the home page.<sup>1</sup> Group Leaders are advised to be familiar with these documents.
- b) Third Age Trust Website (<https://www.u3a.org.uk>) Interest Groups Online (abbreviated as IGO) is an online u3a community that gives you the opportunity to join groups, talks and courses from the comfort of your home. In the same way as a u3a, the activities are run by members and are a great way to meet people from across the u3a movement. Use the navigation buttons below to quickly find the content you're looking for on the page.
- c) Various teaching aids are available for loan to Group Leaders for use only on Craven u3a business. Contact the Chair to arrange to borrow any of them. Please see the Equipment List on the Group Leader Information page of the website to see everything that is available. *When being transported this equipment is only covered by our insurance when locked in the boot of a car.*

## **Appendix I**

### **Third Age Trust Advice to Group Leaders on Handling Money**

The Third Age Trust has provided advice to all u3as 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, coffee money etc., should **NOT** be referred to the Treasurer.

Group Leaders dealing with large sums of money (for trips etc.) should NOT use their own bank accounts nor should they under any circumstances set up a bank account for their group using the u3a name. Group Leaders should seek advice from the Treasurer who, if it is deemed appropriate, will make arrangements for the Craven u3a account to be used.

**Travel Activities:** Leaders may organise field trips and outings to suitable subject areas. This should be encouraged as it increases interest and social involvement.

**Accommodation:** It is recommended that any Leader organising trips which include accommodation, should ensure that all cheques for payment be made out by individual members to the accommodation provider and not to the Group Leader. This is to ensure that he/she cannot be accused of acting as a Tour Operator, which has significant legal and insurance responsibilities and the possibility of serious financial and legal risks to both individuals and the main u3a.

**Donations:** Group Leaders are reminded that any money received or collected by their group as donations to charities should be paid direct to those charities and not to the Craven u3a Treasurer. Receipts should be obtained and retained by the group.

## Appendix 2

### Guidance on the handling of venue charges

The group venue charge should be collected from members at the first group they attend. If the group runs for two terms, you should take payment for them both at the beginning of the year. 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 u3a account with *Barclays*. There are a number of ways you can do this.

1. Cash and can be paid into a post office, using a Barclays Deposit card and Cheques made payable to *Craven u3a* can be paid in using Barclay Deposit envelopes.
2. You can keep the cash yourself and pay the u3a by *BACS* from your personal bank account. Please enter your name and the name of the group - abbreviated if necessary - as a reference. Please also keep a record of such payments for your own protection.
3. The committee is looking into the possibility of issuing group leaders with card readers so that they can accept payments via debit or credit cards.

For all methods, please take a photograph of the receipt or a screenshot of the BACS transaction and email it to [treasurer@cravenu3a.org.uk](mailto:treasurer@cravenu3a.org.uk), with the group name. If you receive additional payments, you can keep these until your final meeting and then pay in.

## Appendix 3

### Policies

On the u3a website click on Committee Matters. In the drop-down box click on Policies. The following documents are listed.: General Data Protection Policy, Health & Safety Policy, Equality & Diversity Policy, Risk Assessment Forms, Safeguarding Policy and Procedure, Visitors Policy for u3a venues being used, TAT Insurance Cover Note, Incident Report Form