



SANDBACH & DISTRICT U3A

Registered Charity No: 1105144

GROUP LEADERS' HANDBOOK

Revised December 2019

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Introduction

Welcome to Sandbach U3A and thank you for taking on the role of Group Leader.

This document has been updated following the change in procedures as a result of the new computer management system SWISH. It is intended to help new and established Group Leaders carry out their role with confidence and to follow the new procedures in a uniform way.

At times it may seem simplistic or to be stating the obvious but the aim is to help leaders and deputies avoid any unnecessary problems.

This handbook will help you with the general administration of your group and be a point of reference for queries you may have. However, if you come across something that you cannot understand or want to talk through any point of administration or aspect of your group please contact the Groups Co-ordinator.

E-mail: groups.co-ordinator@sandbachu3a.org.uk

The U3A ethos

This 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.

Self-help learning principle:

- Members form interest groups covering as wide a range of topics and activities as they desire.
- Learning is **by the members, for the members.**
- No qualifications are sought or offered. Learning is for its own sake, with enjoyment being the prime motive, not qualifications or awards.
- There is no distinction between the learners and the group leaders. They are all U3A members.

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.

New Leaders

The first steps to starting a New Group

We welcome anyone who is interested in starting a new group to have a go, here are some basic points that should help you get started:

- Firstly decide what the group is going to be about, consider what interest there might be in the subject perhaps by some informal soundings.
- Chat to the Groups Co-ordinator, groups.co-ordinator@sandbachu3a.org.uk who can offer support with ideas for the development of the group and if appropriate will put you in touch with a national subject adviser or another similar subject group in a neighbouring U3A to get some first-hand knowledge.
- Consider what the aims of the group are – what are you hoping to learn/achieve/ share by offering the group?
- Write a short description of the group, (you can use the “New or additional group” form which is available on the website. <http://sandbachu3a.org.uk/new-or-additional-group-form/>) Send this to the Groups Co-ordinator so it can be used to promote the new group via the diary update, newsletter, website, library notice board and members morning meetings.
- Once you have some interest, exchange emails or arrange a meeting with those interested to discuss what they would like to see and do with the group.
- You also need to discuss if the group will meet weekly, monthly or even every other month. There are no set rules for this – it’s up to you.
- Let the Group Co-ordinator know that you will be starting a new group. If you need a venue they will ask the Programme & Venue Co-ordinators to book this for you. They will also integrate your group into the main program and let you know what session fee to collect.
- Let them know when you would prefer to meet and if you have a specific venue in mind. If it’s a private address then that gives you more options. You could even rotate the venue around different members’ houses.

Preparing for your first Group Meeting

1. The Groups Co-ordinator will need to add your “new” group to the computer system (SWISH). Using the “New or additional group” form please supply them with all the relevant information.
2. SWISH allows Group Leaders to manage most aspects of their group themselves, please see “SWISH - How to Guide for Group Leaders” available on the website <http://sandbachu3a.org.uk/how-to-guide-for-goup-leaders-swish-instructions/>.

Arrangements can be made for anyone who wishes to receive one to one training on the SWISH system, please contact the Groups Co-ordinator for further information.

3. If you have a list of members who want to join please add their names to your group on SWISH prior to the first meeting. In addition please print out a register using the SWISH “View Group Details” page
4. You will also need to print out a copy of your groups “emergency contact details” using the SWISH “View Group Details” page. If there are any gaps in the information please remind members to update their “Profile” by logging onto the website. If they are unable to do this themselves please ask them to forward their emergency contact information to the Membership Secretary.
5. Your group members will be looking to you, as Group Leader, for leadership so it’s useful to have an action plan for the first meeting and outline what you hope the group will achieve over time.
 - 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 – i.e. help with basic admin tasks such as recording attendance, collecting session fees or communicating with group members or by becoming deputy leader to cover absence/holidays
 - 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 some ground rules e.g.
 - ❖ Be punctual
 - ❖ Listen to each other
 - ❖ Allow others to speak

- ❖ Let someone know if you are unable to attend
- ❖ 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

6. If a member is willing to become a deputy please pass their name to the Groups Co-ordinator so they can be recognised as a “leader” on the SWISH system.
7. U3A is all about shared contributions and presentations so do let the group know that you may be looking to them to contribute by researching an aspect of your subject or taking one of the meetings (working in pairs may encourage people to volunteer).
8. There should be an opportunity for discussion during the meeting so everyone has the chance to have some input.

Reminders for Group Leaders

9. **Group Management**: SWISH allows Group Leaders to manage most aspects of their group themselves, the Guide “SWISH - How to Guide for Group Leaders” provides clear and detailed advice on:

- How to edit information on the group page
- Add/remove members names
- Manage waiting lists
- How to send emails to the Group or individuals
- Create and download a Group register
- Record attendance, session fees and bank remittances

<http://sandbachu3a.org.uk/how-to-guide-for-goup-leaders-swish-instructions/>

NB: Individual or group training sessions on SWISH can be provided if required, contact the Groups Co-ordinator for further information.

10. **U3A Year**: This runs from September to May and programme planning starts from February onwards. The Programme and Venue Co-ordinators will contact you and ask you to confirm the details of your group for the following year. The programme will then be collated and a Group prospectus will be available in July/August.

11. **Venues**: if your group uses a hired venue this must be booked by the Programme and Venue Co-ordinators. Details of the room booking, including the dates you have requested will be confirmed by email.

If for whatever reason a meeting has to be cancelled please inform the Programme and Venue Co-ordinators so that they can cancel the room booking as required. Email address: programme@sandbachu3a.org.uk or phone: **08445899670**

If the venue has to cancel any dates the Programme and Venue Co-ordinators will inform you as soon as possible and seek an alternative meeting date if one is available.

If your group requirements change or you experience any problems with the venue, please contact the Programme and Venue Co-ordinators to discuss the situation.

12. **Website - Group Page**: At the start of each term check your Groups Page to ensure that it is up-to-date and does not require any further editing. If you require help uploading information to the website please contact the Groups Co-ordinator.

13. **ICE (In Case of Emergency)**: At the start of each year use the “View Group Details” page on the SWISH system to print a copy of your groups emergency contact details. Ensure you have this at all your groups meetings.

If there are gaps in the information please remind members to update their “Profile” by logging onto the website. If they are unable to do this themselves please ask them to forward their emergency contact information to the Membership Secretary.

14. **Attendance Register**: At the start of each term print off an attendance register which can be downloaded from the SWISH system “View Group Details” page.

Group Leaders/Deputies should ensure a register is kept of all members attending each session. This is important for a number of reasons; the list is used to check that everyone is safely out in case of fire; the numbers of attendees and fees collected need to be recorded on SWISH.

Please keep your registers should there be any queries. The Treasurer does not require copies of these as all the financial information can be extracted directly from SWISH. However if a buddy supports your group by entering data on your behalf please send your register to the Groups Co-ordinator via the U3A box in Sandbach Library.

15. **Group Finance**: Using the information collected on the Register you will need to enter the Number of Attendees for each meeting on SWISH via the Group Finance section, “Add Meeting Report”. This information should be entered at least once a month.

16. You will need to collect attendance fees at your meeting. The rate will have been set in advance of the group being formed and details published on your page on the website.

17. You are responsible for collecting the money and paying it into the bank. You can pay cash/cheques into the bank using the paying-in book provided, or use a bank transfer to pay the money directly into the Sandbach U3A bank account. See Group Finance (Add Bank Remittance) section on SWISH or page 31 “SWISH - How to Guide for Group Leaders”

18. **Do not hold back any attendance fees to cover the costs of expenses.** All attendance fees collected must be paid into the bank. Expenses should be discussed with the Treasurer so they can be agreed before any expenditure occurs. See section 27 for further information.
19. Banking can be done periodically, but must be at least twice a year, preferably at the end of December and the end of May. Once you have paid your group fees into the bank you must complete the Group Finance “Add Bank Remittance” page on SWISH.
20. Please ensure you have banked all money before the Financial Year End which is 31st August. Doing this will minimise the adjustments the Treasurer has to make when compiling the Final accounts. If for some reason you need to keep some cash in hand please discuss it with the Treasurer in advance.
21. **Health & Safety:** If you are meeting in a hired venue or leading a walk please complete the relevant Risk Assessment Form(s) prior to your meeting/walk. <http://sandbachu3a.org.uk/risk-assessment-forms/>

If you're unsure about the information required for this please complete the form in conjunction with a member of staff from the venue or seek the support of other Group Leaders of a similar activity or the Groups Co-ordinator.

Ensure that you know all the safety procedures for the Venue you are using i.e. alarm system, fire escape routes and assembly point and explain these to your group at your first meeting and whenever a new member joins.

Please give a copy of your Risk assessment to the Venue Manager and send a copy (via the box in the Sandbach Library) to the Groups Co-ordinator. Retain a copy for your own records.

22. **Accident Reporting:** If an accident occurs during the meeting, you should take appropriate action at the time and subsequently complete an Accident Report Form. Download a copy from the website: <http://sandbachu3a.org.uk/accident-report-form/> see also Appendix 3. This form should then be passed on to the U3A secretary via the U3A box in the Sandbach Library.

If the Emergency Services are required they will normally ask for a postcode to enable them to direct help to you more easily. Leaders should have their venue post code easily accessible (normally on the register sheet).

Outdoor group leaders can inform the emergency services where they are when 'out of town' by using:

- A free mobile phone app – OS Locate which gives an OS reference that the emergency services can use to locate you.
- A Fast Find device. Sandbach U3A has 2 devices (held by the long walking group) which can be borrowed if you are going somewhere where there may not be a mobile phone signal. Contact membership@sandbachu3a.org.uk for further information.

23. **Absence:** You may need to ask a member of your group or your deputy to stand in for you in times of absence. If for whatever reason a meeting has to be cancelled or alternative arrangements made please ensure that your members are given enough notice.

Use the SWISH computer system to send e-mails to members for ease of communication. **NB:** Not all members will have email addresses, so you may still need to phone certain individuals.

Contact phone numbers for group members are contained on the "View Group Details" on SWISH. If your group is large or there are any changes at short notice you may want to operate a "cascade" system of phone calls, this system should be agreed with your group at the beginning of each term.

24. **Waiting Lists:** If your group is full please keep a check on your waiting list so that if a member drops out the vacancy can be filled. If your waiting list becomes full, please let the Groups Co-ordinator know, as it may be that arrangements can be made to move to a different venue, or start a another group.

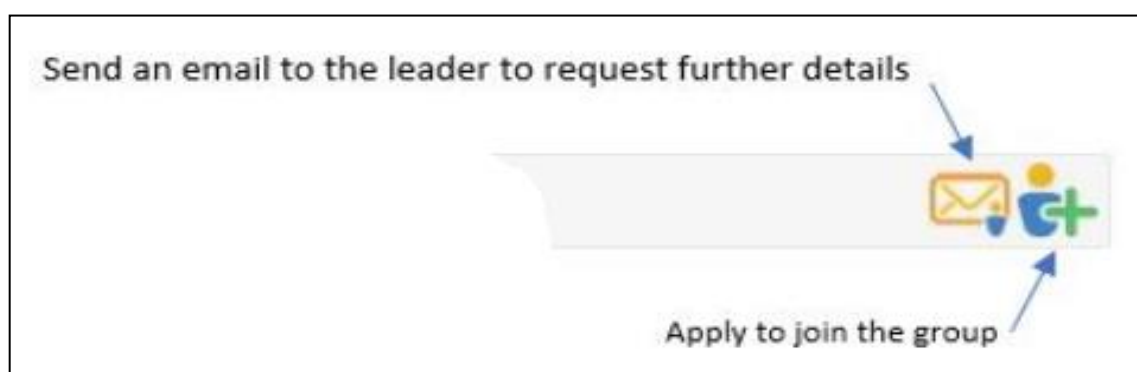
25. **Non-attendance of members:** If a member of your group is absent for three consecutive sessions without informing you then we suggest you phone them to see if they wish to continue in the group. If there is no good reason for their non-attendance then please advise them they will be removed from the group and their place will be offered to the next person on the waiting list.

26. **Group Vacancies:** Group vacancy information on the website will be used by new or prospective members and the Groups Co-ordinator on behalf of the Committee. Therefore it is critical that Group Leaders keep this information up-to-date at all times and if any changes occur inform the Groups Co-ordinator immediately.

27. **Group member issues:** Should any problems/concerns arise regarding group members, please feel free to contact the committee or Groups Co-ordinator to discuss these. Whatever you decide, the committee will support your decision. For the full policy on Group Membership please see Appendix 1.

28. **Requests to join your group:** Members can use the links (see below) on the group webpage to email a group leader requesting further details or to apply to join the group. If they apply to join the group you will receive an automatic message and will need to contact them to discuss their membership of the group.

Members can also enquire at the fortnightly Library Desk about your group, the person on duty at the desk will pass their details to you.



29. **Expenses:** Group Leaders may claim for costs incurred in preparing, presenting or organising their activities. The cost of consumables is not normally reimbursable and should be covered by contributions from group members and not by the Group Leader, for example, materials for craft work.

An expenses claim form can be downloaded from the website, see link below. The claim should be accompanied by receipts whenever possible and larger items over £50 should be submitted to the Treasurer for approval in advance.

<http://sandbachu3a.org.uk/expenses-claim-form/>

We do not normally reimburse travelling expenses, except those incurred by a member travelling on approved business. Contact the Treasurer to obtain approval in advance.

Claims made without prior approval will only be reimbursed in exceptional circumstances.

General information

30. **Photocopies:** If you require photocopies, these can be done at the CVS offices in Crewe (Ashton House, 1A Gatefield St, Crewe CW1 2JP) where the U3A has an account. Alternatively please ask a Committee member about obtaining photocopies from Sandbach Enterprise Centre.
31. **Equipment:** If you need the use of a projector or any other equipment, please liaise with the Groups Co-ordinator who will explain how these can be booked and where they are collected from.
32. **Group Sign-Up Day:** Please arrange to attend on this day or send a deputy. It is a good chance to publicise your group and encourage new members. The Group Sign-up Day is usually held in August, on a date arranged well in advance and communicated to you in good time.

Members of your group need not attend the sign-up day, if they have previously indicated to you that they do wish to continue for a further year.

On the day, please add names as people express an interest in joining your group. It is no longer necessary for members to give you a membership card number as all their information is contained on the SWISH system.

33. **Keeping Group Members informed:** The information flow between Committee and Members is important to our continued success. One of your responsibilities as Group Leader is to make sure that members are aware of current information. The Diary Update is e-mailed directly to all members with a valid email address and is also available on the website, but you will find it useful to have a copy of this and the Newsletter to hand at your meetings and let everyone know what is included. It would be helpful if you could identify the members in your Group without e-mail and introduce a buddy/cascade system to ensure the same communication is received by all Group Members.
34. **Group Outings/Trips:** If your group decides to take a trip out instead of the usual meeting, please let the Groups and Programme and Venue Co-ordinators know the date so they can (a) check it does not clash with other outings within U3A and (b) cancel the booking of your venue as required.

If you need help arranging an outing please contact the Groups Co-ordinator as there is an advice sheet – ‘Social Events and Travel’– which can be provided on request and explained to you.

35. **Insurance Cover**: Sandbach U3A carries public liability insurance for damages caused by negligent acts or omissions by ANY of its members. There is no need therefore for additional cover specific to Group Leaders.

Resources

36. The national U3A website has a range of resource material which may be able to help you, i.e. DVDs or publications <https://www.u3a.org.uk/>

DVDs & CDs covering many subjects are available for all U3A groups to borrow free of charge, except for the cost of return postage. To borrow items from the collection, you will need to register on the U3A website and either login and order online or contact the U3A by telephone, email or letter.

37. There are also national co-ordinators on various subjects within U3A – you will have seen articles in the U3A magazine. The Groups Co-ordinator can help you make contact with the person concerned with the same subject as your group.

38. Looking at the websites of neighbouring U3As is also useful, especially if there is somebody already running a group on the same subject, as you could make contact to share ideas. Here again the Groups Co-ordinator can help you make these contacts.

39. Finally, do not be afraid to admit you don't know a lot about a certain subject or cannot answer members' questions. Unless you really are an expert in a particular field, it is likely that you too will be learning as you lead the group.

Appendix 1 - Policy on Group Membership

Membership of groups within the Sandbach U3A is at the discretion of the Group Leader who is best placed to decide on the suitability of a Sandbach U3A member for their group.

Group Leaders can offer advice to U3A members before they join a group concerning what is going to be required as part of their group.

At the same time the Group Leader can assess the U3A member's suitability.

If during these discussions it becomes clear that the group would not be suitable for the enquiring U3A member then the Group Leader can tell the member that they cannot join the group.

Instances may occur when a U3A member has joined a group but it becomes clear that they:

- are not able to participate fully e.g. undertaking a walking distance
- are disruptive and neither contribute positively or learn from the group
- do not undertake group activities as required
- undermine the Group Leader

If a Group Leader requires advice to resolve any issue with a member of their group, then they should contact the groups' co-ordinator with details on:

E-mail: groups.co-ordinator@sandbachu3a.org.uk

In consultation with the Committee, the groups' co-ordinator will help the Group Leader to reach a satisfactory solution.

Ultimately, Sandbach U3A Committee will fully support a Group Leader in any decision they make concerning membership of their group.

January 2017

Appendix 2 - Policy on Group Waiting Lists

Waiting lists are the sign of a successful group but we need to manage them well.

You should always work on a first in first out policy.

If the next person on the list is unable to take up the offer to join your group straight away, you should advise them that they will be placed back at the end of the queue again and invite the next person on the list.

YEAR END:

We have a lifetime membership policy, and so waiting lists should continue each year and are not wiped clear.

COMMUNICATION:

Keep in contact with those on the waiting list, at least once every two to three months. Let them know how many others are also waiting and, if possible, where they are on the list. Ask them to confirm that they still wish to remain on the list. If you get no reply within two to three months, then you should remove them from the list (put a note about this on any email you send them). Let people know if you remove them.

SIZE:

Waiting lists should not get too big. If they do get too large, please contact the Groups' co-ordinator. Consider asking amongst the active members, and those on the waiting list, for somebody to start another splinter group.

HELP:

If you are worried about starting or managing a waiting list please get in touch with the Groups' co-ordinator or any member of the committee. We are here to help and advise you.

Email: groups.co-ordinator@sandbachu3a.org.uk

January 2016

Appendix 3 - ACCIDENT REPORT FORM - SANDBACH U3A

Name of Injured party/address/telephone number:

Name/address/telephone number of others involved:

Date/Time of Accident: Location:

Nature of Accident/Circumstances:

Injury Details/Property Damage:

Name/address/telephone number of person causing injury/damage:

Witnessed by:
Address:
Telephone number:

Action Taken:

Was any specialist assistance required at the scene? If so give details.

Was medical advice sought afterwards? If so give details.

Name of Group Leader Telephone number

Signed (injured party) Signed (group leader)

Date

Group Leader to retain original: Copy to Sandbach U3A Secretary (Leave in library box)

Appendix 4 - Contacts

Sandbach U3A Committee Members contact details.

Chairman	chair@sandbachu3a.org.uk
Secretary	secretary@sandbachu3a.org.uk
Treasurer	treasurer@sandbachu3a.org.uk
Membership	membership@sandbachu3a.org.uk
Programme & Venues Co-ordinators	programme@sandbachu3a.org.uk
Groups Co-ordinator	groups.co-ordinator@sandbachu3a.org.uk
Webmaster	webmaster@sandbachu3a.org.uk
Social Events	eventsorganiser@sandbachu3a.org.uk
Newsletter Editor	newsfeed@sandbachu3a.org.uk

Alternatively you can phone 0844 58 60670 and leave a message and your contact number when prompted. We will get back to you within 48 hours.

If you are unsure, please e-mail: groups.co-ordinator@sandbachu3a.org.uk