



Cheadle (Staffs) U3A

GROUPS LEADERS

HANDBOOK

THIS HANDBOOK IS MEANT AS SOURCE OF REFERENCE AND YOU SHOULD FAMILIARISE YOURSELF WITH IT CONTENTS.

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INTRODUCTION

Having set up your group, via the Groups Co-ordinator and the approval of the Executive Committee as Group Leader you play a vital role within the overall structure of the U3A and interacts with the membership probably more than anyone else.

This Handbook is designed to help and guide the Group Leader and to act as a source of reference.

Whilst it endeavours to cover everything, such documents are seldom definitive, which is why the Committee will always be available to you for further support and guidance.

Groups Co-ordinator

The Groups Co-ordinator is generally the prime source of advice and support for the Group Leaders. The role includes:

- Inducting new Group Leaders regarding administrative requirements and providing ongoing support.
- Maintaining relevant paperwork (e.g. Activity and Group Leader listings) in the production of advertising leaflets and distribution of same through library service, Cheadle Leisure Centre and monthly Coffee mornings etc.
- Communicating with all Group Leaders on matters pertaining to their role.
- Assisting with the arrangement of and attending the annual Group Leaders meeting, including lunch.
- Negotiating appropriate rental arrangements as required, liaising with Treasurer and Chairman and seeking Committee approval.

Group Leader

As Group Leader you will be the focal point from both within and outside of the group and there are certain responsibilities incumbent on the role:

- To familiarise yourself and comply with the contents of this information folder.
- To ensure all your group activities are carried out in accordance with the H&S policy.
- To administer the finances for your group.
- To maintain a group register.
- To check that all your group's attendees are current members of Cheadle U3A or one of its Neighbourhood Link partner U3As, . Stafford, Cannock Chase (Rugeley), Stone and District, Uttoxeter and Stoke South
- To check that the building is empty and the lights are out when locking up premises after a meeting
- To attend the annual Group Leaders' Meeting.
- To update the GL Folder when required.
- Ensure that your group's web site page is kept up to date (either personally or via the Webmaster).

However, you may choose to delegate some/all of the administration (register, collection of session fees, etc., risk assessment, etc., to another member(s) of your group. **See also page 10 for Joint Group Leaders**

GROUP LEADER'S HANDBOOK

Your group folders should be returned to the Groups Co-ordinator if you decide to close your Group or you resign as the Group Leader. The GL Folder contains information on and/or examples of:

- Group Co-ordinator's Role
- Guidelines for Group Leaders
- Eligibility for Membership
- Contact Details for Current Committee Members
- Health & Safety Policy
- Risk Assessments
- Accident Reporting
- Data Protection Policy
- Register
- Cash Envelopes (further supplies can be obtained from the Membership Secretary at the Coffee Morning)
- Membership Application Forms
- Expense Forms
- Accident Forms

GROUP SIZE

The maximum numbers in a Group depends on venue size, Health and Safety, activity being carried out and is at the discretion of the Group Leader.

ELIGIBILITY FOR MEMBERSHIP OF THE U3A

Membership of The U3A shall be open to individuals who are in their Third Age (being the period of time after the first age of childhood dependence and the second age of full time employment and/or parental responsibility) residing in Cheadle Staffordshire and its surrounding locality.

Individual queries regarding a membership issues should be referred to the Committee via the Groups Co-ordinator, who will advise the Group Leader appropriately.

The aim of Cheadle U3A is to provide opportunities for its members in leisure time, including educational and recreational activities, with the object of improving the quality of life and in the interests of their social welfare.

ELIGIBILITY FOR MEMBERSHIP OF A GROUP

Subject to vacancies, group activities are open to all members. Prospective new members should be given the opportunity to assess whether they are capable of participating safely and independently in any group activity, especially those of a more strenuous physical nature. If they are not able to participate independently they should ideally nominate a 'Buddy' or 'Carer', at the group leader's discretion, to be with them during the activity in order to meet group activity criteria. In essence, *for all*

groups, members and leaders should ensure, in every reasonable sense, that adequate interaction, socially, physically or technically, is possible with the existing group.

In the event of difficulties developing with existing members of a group, the GL should refer the matter to the the Group Co-ordinator, but (in urgent cases) has the authority to suspend the member pending an enquiry by the Committee.

Leaders of Performance Groups should state clearly on the website the levels of competencies and commitment required to participate. Similarly, leaders of any groups participating in specific projects or training should emphasise on the website the necessity to join at the start and give the date.

CHILDREN AND OTHER NON-U3A ATTENDEES

It is sometimes necessary for a member to bring a child, minor or dependent to a session in order to be able to attend. (e.g. Half Term perhaps). Whilst this is discouraged it is not banned and a modicum of 'common sense' can be applied to the individual circumstance. These attendances should however, be the exception not the rule.

It should be noted however that these attendees would not be covered by the normal U3A insurance.

In the event of any difficulties in the interpretation of any of the above clauses, the Group Leader should seek the advice of the Executive Committee via the Groups Co-ordinator.

GROUP REGISTER

Your group register should contain the membership number, name and telephone number of each and all group members. You should add any new members to the register and record the attendance of each member at each session in the register. Should there be an incident which requires evacuation during your group session you should use the register to ensure everyone is off the premises.

When your register is full you can scan it and e-mail it to the Registers Secretary, if you do not have access to this facility you can post it. A new register will be sent to you by e mail. If you have difficulty with the process please liaise with the Registers Secretary.

Registers are held on file against any future audit requirements or incident queries.

VISITORS

Individual U3A and non-U3A visitors can attend one 'taster' session of any group, with the prior approval of the Group Leader, without paying the group fee.

You should insert names of visitors on the register (marked with a 'V') and denote whether U3A member or non-U3A visitor.

Members of other U3As may join an activity at the discretion of the Group Leader and on production of their current membership card, provided there is no waiting list. They pay the standard session fee.

ALMONER

Group Leaders are requested to contact the Almoner whose role is to act as the link between the organisation, members and their families in times of distress (e.g. after a bereavement, serious ill-health or hospitalisation of a member). To effectively carry out this role, the Almoner needs to be informed of such situations as soon as possible. Contact details for the Almoner are included in the Appendix.

FINANCIAL ADMINISTRATION

Fees and grants for all Group Activities

Fees

1. Members of the U3A pay the agreed annual membership fee. Group Leaders are eligible for concessionary membership during the time they are Group Leaders.
2. All group session fees are currently £1 per member per session (except the Group Leader), with the exception of Social Activities e.g. Cinema, Day Trips, Dining Club, which are paid by every member at every session. Additional fees may be requested from members attending group sessions to cover extra expenses – e.g. a fee to cover the costs of an invited outside speaker.
3. Should you wish to organise a study trip you should make provisional arrangements and agree with the treasurer all the payment arrangements. The organiser and the treasurer will agree a 'sales' price usually including a small mark-up as a contingency. The prospective attendees will book with the organiser but all cheques should be made out to the U3A social account. All payments must be made by the Treasurer, with the full involvement of the committee.
4. If a group activity involves the use of cars then individual members should bear the cost of this themselves: fuel costs should be shared between those sharing each car. Where car parking costs are unavoidable an individual attending an activity that does not involve premises costs (e.g. Rambling, Walking, Pub Strolling, Cycling, Bird Watching, or any other group out on a field trip) can have reasonable parking costs refunded from the takings for that session. Where there is a requirement for an individual to carry out reconnaissance for a session a contribution can be made to the costs of this (e.g. parking and fuel) from the takings for the session, at the Group Leader's discretion.
5. Members should endeavour to minimise the number of vehicles by car sharing to reduce costs.
6. *All other costs*, such as admission charges and materials used by individuals should be met by each individual involved.

Trips

The organiser will arrange a trip and agree with the treasurer all the payment arrangements. The organiser and the treasurer will agree a 'sales' price usually including a small mark-up as a contingency. The prospective attendees will book with the organiser but all cheques should be made out to the U3A social account. All payments must be made with the full involvement of the committee.

Cheques should not be made out to the organiser

The organiser should not pay the supplier with a personal cheque or credit card.

Grants Available to Groups

1. A start-up grant of up to £50 is available for all new groups if necessary to cover essential group equipment.
2. A smaller sum of money (up to £25) is available **if necessary** for each Group Leader to draw upon annually to cover essential equipment and materials costs for the group as a whole. Any requests for monies in excess of this should be put in writing for full Committee consideration. Equipment and materials for individuals in that group are not included in this sum.

Membership Subscriptions

Prospective U3A members attending their first session are not required to have paid their membership subscription. However, if they intend to continue in the group you should give them a Membership Application form and ask them to complete it and send it, with their subscription and a stamped self addressed envelope, [cheques payable to Cheadle (Staffs) U3A], or take it to a coffee morning and hand it to the Membership Secretary before they attend their second session. Membership fees should not be accepted by Group Leaders.

Handling of session fees

All cash collected at a session must be entered in the group register and the total taken entered on the cash received envelope. Spare envelopes are available to collect from the Membership Secretary at Coffee Mornings.

The envelope should be delivered on a regular basis to K & G Riley, Watchmakers and Jewellers at 55 High Street, Cheadle, (open 9am-5pm Monday to Friday 9am-2pm Saturday and 9am-1pm Wednesday) where we have a special arrangement for its safe-keeping. Alternatively it can be dropped off at the Treasurer's home, or handed over at coffee mornings.

If any of the monies collected at the session is used to reimburse reconnaissance costs, car parking, or other small items (see guidelines above) the amount reimbursed and to whom must be clearly shown on the cash envelope.

Expenses

You may claim expenses incurred from the operation of your group. Examples of what may be claimed are:

- a) Re-imbusement of expenditure for equipment purchased for the Group in accordance with the Guidelines 2.6.
- b) Expenses in travelling between home and the fixed location at which sessions are held. The current car mileage allowance is available from the Treasurer. See Page 12 for Performers expenses.
- c) Expenses incurred in contacting members of the Group by telephone, e-mail or post and any associated printing and stationery costs.

Note: Members of craft and sports groups are expected to purchase their own equipment and consumable items, but a selection of such items may be purchased for use by new starters for a limited period (3 sessions).

All expense claims should be documented with receipts attached where applicable. Group Leaders should maintain records of car journeys, telephone calls etc for which they are to make claims although it is sufficient when making a claim to summarise this information (e.g. 20 return journeys of 8 miles/total of 160 miles for travel between home and Guild Hall @ X pence per mile) and the time period covered by the claim, where applicable. Group Leaders should submit expense claims to the Treasurer at the latest by **15 December** in order that they may be reconciled before the accounting year end at 31 December.

Claim forms can be accessed from the U3A website; click on Archive, then on Admin, then on U3A Claim form. The Treasurers address is printed also on there.

RESOURCES

A photocopier is located in Cheadle Guild Hall. Photocopier access codes are only issued to Committee members and Group Leaders as appropriate. Please refer to the Photocopier Policy on the Cheadle U3A website or contact the Group Co-ordinator for information on obtaining photocopies required for your class. Should you need to enter the Guild Hall to collect copies please contact the Group Co-ordinator for access details to the building. Do not give this information to anyone else.

There is an inventory of items which may be available for Group Leaders to use. Please contact the Groups Co-ordinator for further details.

A projector is available at the Guild Hall and can be booked by contacting the Groups Co-ordinator.

A laminator is located in the Guild Hall computer suite. It is stored underneath the second work surface by the window.

A spiral binder is also available and anyone wishing to use it

Books, CDs, DVDs etc

Where these are purchased by Cheadle U3A for use by Group members, they are to remain the property of U3A. These items are to be marked up as U3A property and books (e.g. foreign language text books) should not otherwise be written in. You should maintain details of the distribution of these and ensure that any members who

give up membership of the Group return such items to you. Alternatively, members may purchase these items for themselves.

ROOM BOOKING/CANCELLATIONS

As mentioned previously, the Groups Co-ordinator is responsible for arranging venues, he/she should also be notified as soon as possible if you intend/need to cancel your group meeting and the date you close your group for holidays i.e. Bank holidays, Christmas, summer, etc. to avoid unnecessary overcharging for premises.

Similarly, if you wish to book a one-off event associated with your group (e.g an art exhibition, or craft day), please contact the Groups Co-ordinator.

CHARITABLE STATUS

Cheadle U3A is a registered charity and as such we cannot promote none U3A events, allow sponsorship requests or the selling of raffle tickets for other organisations, at any of your group meetings.

HEALTH & SAFETY

The contact details of the committee member dealing with H&S are listed in the appendix.

This policy provides general guidelines for Group Leaders and Members in their varied activities. It provides risk assessment checks on the many venues used by groups as well as more specific assessments for outdoor activities, including group trips, U3A day trips and holidays. Included are checklists advised by the Third Age Trust.

All members of Cheadle U3A have a responsibility to be aware of health and safety issues in the conduct of their activities. ***The Third Age Trust has issued the following guidance:***

U3As are self-help co-operative organisations run entirely by the members for the members and therefore it is important that individuals are able to take full responsibility for their own participation in U3A activities/events. Should the situation arise where a member wishes to attend an interest group or activity but is worried that he/she would not be able to participate fully without help, The Third Age Trust has extended its liability insurance policy to cover the attendance of a companion/carer. It is hoped that by doing this, members in this situation will continue to enjoy the full benefits of U3A membership. If you find yourself in this position at any time, please don't stop coming; speak to a member of the committee in confidence and appropriate arrangements can be agreed.

Members of the U3A are encouraged to carry next of kin details and/ or put ICE (in case of emergencies) against a number or numbers in their mobile phone book.

ACTIVITY RISK ASSESSMENTS – Health & Safety

1. Venue Risk Assessment

There is a single checklist applicable to each venue used by U3A.

An **annual** check will be made under the **guidance of the member appointed as Health & Safety Co-ordinator**.

The check lists will then be sent/shared with a venue representative.

Finally, a copy of the relevant checklist will be given to each group leader using that venue, who should familiarise themselves with any highlighted potential risks associated with the venue. The GL should also briefly check the venue each time it is used to ensure things are as they should be and report any identified changes to layout/potential risks to the H&S Co-ordinator.

2 Special Outdoor Activities

Activities like **Walking, Cycling**, etc. each have a Disclaimer, which also includes H&S advice, up in consultation with their group leaders.

It will be necessary for each leader to make a risk assessment before a particular day's event involving its particular location, difficulty etc.

3 Field/Study Trips

A specific checklist related to the U3A aspects of the visit should be used in connection with a Field/Study Trip. Travel provision (and hotel accommodation if appropriate), is covered by the relevant travel companies concerned. Coach operators/drivers are responsible for ensuring seat belts are worn and if toilet facilities are available, though it is advisable for the trip organiser to ensure this is dealt with.

Accident Reporting

In the event of an accident during an activity, an **accident report form** should be completed by the GL and sent (preferably via e mail) to the Health & Safety Co-ordinator/U3A Executive Committee, who will retain a copy on file.

Copies of all the forms referred to are included with this handbook and further copies are available from the Cheadle (Staffs) U3A Health & Safety Representative

DATA PROTECTION

Group Leaders should only hold the names, telephone numbers and e-mail addresses of their group members (unless other information given voluntarily) and are required to comply with the requirements of the Data Protection Act to keep information safe, secure and confidential. A copy of our Data Protection Policy is available on the web site.

JOINT GROUP LEADERS

If a Group is run under shared leadership then the Groups Co-ordinator should be informed, who will arrange for a concessionary membership card to be issued by the Membership Secretary.

Similarly, if one of the joint leaders has to step down for any reason the Groups Co-ordinator should be informed and the appropriate concessionary membership card should be returned to the Membership Secretary.

EXPENSES FOR PERFORMING GROUPS

Members of performing groups who go out to give performances on behalf of Cheadle U3A are entitled to reimbursement of their travelling expenses from any donations they receive for their performance.

As a guide travelling expenses should be paid at a rate of 15p per mile and the distance should be calculated as the distance from Cheadle town centre to the venue, not from each member's home address. Members should be encouraged to car share. Any donated funds received over and above travelling expenses should be passed to the Treasurer, who will note such amounts in the U3A Annual Accounts.

DISCLAIMERS

Group Leaders of the walking groups, birdwatching group and cycling groups must ensure their members are familiar with any Policies and H&S Procedures and have signed the relevant disclaimer.

FINALLY, remember that once a group is set up with the prior approval of your Committee, and provided local Guidelines and Procedures are adhered to, you are fully protected by the Liability Insurance Policy provided by the Third Age Trust.

Cheadle U3A Executive Committee 2017-2018

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