

# Guidelines for Group Leaders

*Revised 15<sup>th</sup> August 2019*

Throughout this Guideline, the words “Leader” and “Group” are used; as the Craven U3A Committee feel these are better than the mixture of ‘Tutor’ and ‘Class’/‘Course’ used in the past. Without volunteer Leaders there would be no Craven U3A. Your skills and expertise enrich our local community and make it a better place to live. Thank you for what you do! Craven U3A Committee values its Group Leaders and is committed to providing them with every possible support in their work. These Guidelines are designed to ensure clarity about the role of a Craven U3A Leader and to assist them to carry out their work effectively. Suggestions for improvements to this document would be welcomed by the Craven U3A Leader Representative.

## 1. Group Leaders

- are Honorary Members of Craven U3A and do not pay the membership fee. They are volunteers and do not receive any payment.
- are invited to an informal Leaders’ Meeting each year to discuss issues affecting them and to thank them for their work. They are represented by a ‘Leader Representative’ on the Craven U3A Committee and this Representative (currently Clarissa Jarvis: email: groupleaderrep@cravenu3a.org.uk phone: 01756 798611) should be consulted first with any general query/suggestion which needs committee consideration.
- are encouraged to advertise their group in the Craven U3A Magazine and meet prospective group members by putting on a display at the Craven U3A Open Event in August each year
- are the public face of Craven U3A. Please help Craven U3A by being careful to operate within its rules and policies, and in a manner that maintains and enhances its reputation.

## 2. Leaders’ Expenses

A Leader’s status as an Honorary Member is a mark of gratitude for their work and to offset the minor inevitable expenses that they incur. Each Group can only have one Leader nominated as the one to be an ‘Honorary Member’. For major expenses a claim form should be submitted to the Treasurer. Consumables (e.g.: handout notes, playing cards) should be paid for by a levy on the members of their group.

Leaders using their own homes for holding meetings are given a grant of £10 per year to help cover heating and incidental costs. This does not apply to groups which meet outside or which rotate through different homes.

## 3. Groups

**a) Group details.** The Programme Secretary organises everything to do with the Craven U3A programme. He/she is also responsible for organising the Open Event, with help from other committee members. **Leaders are asked to meet deadlines for information to the Programme Secretary. Starting and finishing dates and half term (if any) are determined by each Group Leader. Any changes should be notified to the Programme Secretary and the Venues Secretary.**

**b) ‘Beacon’** is an ideal way of keeping in touch with your group. It is available via the Craven U3A website under: ‘Beacon Logon’ (with your username & password > ‘enter’ > ‘Group’> your Craven group). You can then input or change the ‘information’ that you want to appear and the dates and start time (if you change these let the Programme Secretary and Venues Secretary know). Under

'Members' you can see your group's membership list, which you can download, and use this list to send them emails. If you add new members, or delete any, let the Membership Secretary know.

**c) Venue details.** Prior to the course commencing each Group Leader should complete a **Venue Risk Assessment Checklist** (copy available on web site: 'Leader' > 'Forms') by visiting their venue; taking note of any particular safety hazards, emergency exits, disabled access and the location of First Aid facilities. **The completed form should be returned to the Leader Representative.** In the unlikely event of an accident or injury to a group member or Leader, the incident should be reported to the Craven U3A Chairman and an **Incident Report Form** completed (found under 'Leaders' > 'Forms' on the Craven U3A website). The completed form should be sent to the Chairman. 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 Craven U3A Venue Secretary** and let the Leader Representative know.

Craven U3A will pay accommodation costs for up to 22 meetings a year for each group with 10 or more enrolled members. Any additional meetings should be booked by Craven U3A so that the group is covered by the Third Age Trust Insurance but the cost of using the venue for these additional meetings will need to be met by the group. 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. Craven U3A has a number of teaching aids available for use by Leaders (see item 4. 'Resources for Leaders' below).

**d) Group membership.** A list of group members with names, addresses, e-mail addresses and 'phone numbers will be provided via 'Beacon' to each Leader prior to class commencement. Leaders should check their group descriptions and time tables as soon as they are received, to spot errors & avoid misunderstandings. If, after enrolment, a change has to be made (i.e. start date or venue, each Leader is responsible for contacting group members to confirm the new start date or venue). 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 Programme Secretary and the Membership Secretary. Leaders should check attendance against this list at the first meeting of the group and advise the Membership Secretary of any people not on the list. Where the group has a waiting list and there are spaces available because of 'no shows' the Leader should contact these people to determine if they do intend to take part. If not, the Leader should invite people from the Waiting List and advise the Membership Secretary so that the group records can be amended.

Please identify new members of Craven U3A and extend them a particular welcome. 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, to 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 as a whole if any member has any disabilities.

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 may appear shy or not answer you – Craven U3A they are not ignoring you they may not have heard you! If there is a hearing loop at your venue make sure that it is switched on and tell the group.

**Visitors** to U3A Groups should be recorded on a separate piece of paper giving the name of the individual & date. This is for Insurance purposes with the Third Age Trust. Please see 'Visitor Policy' on the web site.

In the unlikely event that a group member's behaviour causes problems for the Leader and/or other group members, the procedure in 'Advice to Leaders on dealing with group member behaviour' (item 7. below) should be followed.

Leaders should encourage some of their group members to become group leaders, either to learn something new together, or as a leader in their hobby or working expertise.

**e) WestNet:** there is an "open door" arrangement with the following U3As - Keighley, Settle, Bradford, Ilkley and Craven. This allows members of one U3A to take up an open place in a group of another member U3A, provided the Group Leader agrees. You do not need to notify the Membership Secretary of this, but you must keep a record of their contact details. See "WestNet" on the Craven U3A website.

**f) Group activities.** Leaders are encouraged to organise outings, trips etc in connection with their group but should not use their own bank accounts for any monies (See item 6. 'Advice to Leaders on Handling Money', below). These trips should be optional unless advertised as an integral part of the group.

It is usual for Leaders to 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 Leaders have to cancel a meeting because of illness, weather or other reason it is their responsibility to contact (or arrange for group members to contact) all group members and advise them of the cancellation. Let the venue know of the cancellation and also inform the Venue Secretary & the Treasurer. Where meetings need to be cancelled for more than two weeks the Craven U3A Chairman should also be informed.

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**g) Group financial issues and Insurance.** Leaders may levy a charge on group members for the purchase or hire of equipment, materials, photocopying, trips etc. These costs should be advertised prior to enrolment. **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 Chairman if you have any concerns about the extent of this cover. Craven Stationery, 22/24 Coach Street, Skipton offer a discount to U3A Leaders for photocopying (mention Craven U3A) and can usually do small quantities, while you wait.

**h) If you are not sure what to do in any situation you face as a Group Leader**, or if you require any help, please contact the Craven U3A Chairman. Queries about class lists etc. should be referred to the Membership Secretary, and issues in regard to venues to the Venues Secretary. The Leader Representative has a role in bringing to the Committee issues of general concern to Leaders.

#### **4. Resources for Group Leaders**

**Various teaching aids are available for loan to Leaders** for use only on Craven U3A business. Contact the Chairman to arrange to borrow any of them. Please see the **Equipment List on the Leader Information page on 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.

**Craven U3A website:** (<https://www.cravenu3a.org>) has lots of useful information and welcomes pictures from your group; send to the Webmaster.

**Third Age Trust:** The Resource Centre of the Third Age Trust in London (0208 315 0199, open Tuesdays and Thursdays 9 a.m. to 4 p.m.) has a collection of non-book material for loan free of charge, except for the cost of return postage. The Third Age Trust website is: [www.u3a.org.uk](http://www.u3a.org.uk)

#### **5. Contacts**

**Chairman:** Doug Mclellan [chairman@cravenu3a.org.uk](mailto:chairman@cravenu3a.org.uk)

**Business Secretary:** Peter Wharton [bussec@cravenu3a.org.uk](mailto:bussec@cravenu3a.org.uk)

**Programme Secretary:** Sally Crowley [progsec@cravenu3a.org.uk](mailto:progsec@cravenu3a.org.uk)

**Membership Secretary:** Andrew Todd [membership@cravenu3a.org.uk](mailto:membership@cravenu3a.org.uk)

**Venues Secretary:** Helena Tudhope [venues@cravenu3a.org.uk](mailto:venues@cravenu3a.org.uk)

**Leader Representative:** Clarissa Jarvis [tutorrep@cravenu3a.org.uk](mailto:tutorrep@cravenu3a.org.uk)

**Treasurer:** Ron Golightly [treasurer@cravenu3a.org.uk](mailto:treasurer@cravenu3a.org.uk)

**Webmaster:** Doug Hirst [website@cravenu3a.org.uk](mailto:website@cravenu3a.org.uk)

**Database manager:** Doug Hirst [datamanger@cravenu3a.org.uk](mailto:datamanger@cravenu3a.org.uk)

#### **6. Advice to 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.**

**Leaders dealing with large sums of money** (for trips etc) should NOT use their own bank accounts, also they should NOT set up a bank account for their Group using the U3A name. 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.

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 hotel and not to the 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.

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.

## **7. Advice to Leaders on dealing with group member behaviour**

The behaviour of individual group members may, on occasions, cause problems for both other group members and Leaders. It is recognised that the success of Craven U3A is dependent upon the expertise and goodwill of the Leaders, who give their time and experience freely. The Committee will give maximum support to Leaders to ensure that they and their groups have the most enjoyable experience possible. (see website for more information on 'Sorting out problems and grievances').

### **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 Leader should inform the member that the problem still persists and will be referred to the Committee if the situation does not improve.
- 3.** Leaders should NOT bar a member from their group. 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 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.

*Clarissa Jarvis (Leader Representative [groupleaderrep@cravenu3a.org.uk](mailto:groupleaderrep@cravenu3a.org.uk))*