

### 1. Introduction to Interest Groups

- 1.1 Thank you for agreeing to organise an interest group. We are sure you will find it very rewarding; however, it might seem a bit daunting initially. This handbook is intended to provide advice and support with this.
- 1.2 Interest groups are central to u3a's, and each group will develop its own structure. However, it is important that your group follows the u3a ethos of shared, participative and self-help learning. The result will not only be an increase in knowledge, but a supportive and friendly atmosphere which enables everyone to participate. Details of the u3a ethos and principles can be viewed [here](#).
- 1.3 The title 'Group Leader' is used throughout this document; however, members who help to set up and run interest groups are known by many names. You might be a Group Coordinator, Convenor, Facilitator, Manager or Organiser. This handbook is intended to apply whatever your title.
- 1.4 Taster Sessions. The Group Leader can allow a one-off free taster session to a possible new participant where no costs are incurred. But where venue and/or tutor needs to be paid, a nominal fee can be charged.

### 2. The First Steps to Forming a New Group

- 2.1 You may be taking over from an **existing Group Leader** or **starting a new group**. If you are starting a new group, these are the recommended steps to undertake:
- 2.2 **Agree the development** of your group with the Groups' Coordinator who will assist as necessary:
  - a) Choose a name for the group.
  - b) Advertise through the Weekly Update, (via The Groups' Coordinator), and at monthly meetings for new members.
  - c) Keep a note of their contact details.
  - d) Hold a meeting, or by the email system, agree between potential members a time, day, frequency, venue for group sessions.
  - e) Decide when to start.
  - f) Write a description of the group for the website.
  - g) Inform the Groups' Coordinator of ALL the above details and make sure they are informed of any future changes.

Contact the Groups' Coordinator: [groups@barnetu3a.org.uk](mailto:groups@barnetu3a.org.uk)

### 2.3 Costs

- a) Some groups, e.g. exercise, dance, yoga, Pilates, choir, require a paid tutor.
- b) Some groups meet in a public venue which incurs a cost.
- c) The Group Leader must calculate a budget / cost per member based on prices received from tutors, venue, etc. and based on anticipated numbers of participants.

- d) Some costs may have to be incurred in advance and possibly for a fixed period, e.g. per term. In this case it will be necessary to ensure group members pay their share at the beginning of such period.
- e) Tutors and venues must invoice Barnet u3a, not the Group Leader.
- f) Barnet u3a will check tutors' and venues' insurance cover.
- g) Method of payments by members can be discussed to suit the Group Leader, i.e. they can collect cash and pay a cheque to cover costs to the Bu3a Treasurer for the same amount or use the bank transfer method.
- h) It's essential for Group Leader to maintain accurate records of monies received and paid in respect of their group activity.
- i) The Bu3a Treasurer and Groups' Coordinator can assist in any of these financial matters.

Contact the Bu3a Treasurer: [treasurer@barnetu3a.org.uk](mailto:treasurer@barnetu3a.org.uk)

- 2.4 **Download the relevant [Risk assessment checklist\(s\)](#)** to help you identify any possible risks. If you're unsure or want further advice to speak with your committee or contact the [u3a Office](#)

### 3. The First Group Meeting

#### 3.1 Recommended steps to take at the first meeting:

- a) Introduce yourself and the purpose of the group as you see it.
- b) Ask about the skills and experience within the group.
- c) Register – the Group Leader must keep an updated list of names, u3a numbers, contact details (email, phone) and ICE (In case of emergency) contacts.
- d) Keeping a note of attendance at each meeting is recommended.
- e) Agree the tasks that need doing to run the group and who is willing to support these – for example, who is willing to help with developing the programme or keep the register.
- f) Agree, if relevant, the level that the group will be aimed at – beginners, improvers, advanced.
- g) Agree how the group will work – discussion, instruction, presentation, etc.
- h) Agree when and where the group will run.
- i) Identify any accessibility needs that group members may have. Refer to our [Equality, Diversity and Inclusion](#) policy on our website for advice and guidance.
- j) Make sure all members understand the costs involved in running the group (see 2.3 Costs above). Some groups meet in a pub where members are expected to buy a drink and even when members' homes are used it would be normal for members to contribute to the cost of (e.g.) tea and biscuits.

- k) Discuss how group members will communicate with each other bearing in mind data protection guidance.
  - i) use the blind copy (BCC) function on emails to avoid sharing addresses between all members – using BEACON (see below) for email communication facilitates this.
  - ii) Setting up a WhatsApp group or similar can be a good way of keeping members engaged with the group but please respect the fact that some members will not want to join such a group.
- l) Agree some ground rules e.g.
  - i) Be punctual
  - ii) Listen to each other
  - iii) Allow others to speak
  - iv) Let someone know if you are unable to come
  - v) Agree to disagree amicably and be respectful to other group members. Every contribution matters
  - vi) Have patience with and encourage those who are slower to learn. After your first meeting it is a good idea to feedback what was agreed to your Groups' Coordinator to finalise arrangements.

#### **4. Membership System**

- 4.1 BEACON, our membership system, needs to be populated with information about interest groups to include:
  - a) What your group does.
  - b) How frequently it meets.
  - c) Day, Time, Venue.
  - d) Names of participants.
- 4.2 Using BEACON will allow you to:
  - a) ensure all group participants are current members of our u3a,
  - b) communicate with your group by email by blind copy and ensuring all members are included,
  - c) keep a waiting list that is visible to members and to the Groups' Coordinator
- 4.3 Contact either [John Bent](#) or the [web manager](#) with your telephone number. They can give you a password and lead you through the inputting process.
- 4.4 Membership needs to be checked on Beacon before applicants are accepted into a group.

### 5. Website

- 5.1 Similar information is needed for your group's entry on our website. But here you can expand on the description of what your group does. The entry can be updated periodically with news of recent visits, projects, etc. and can include photographs to show off what your group does. The website also allows different groups to post information to the News section. Send any additions, amendments, and latest news/photographs to the Web Manager.

Contact the Web Manager: [webmaster@barnetu3a.org.uk](mailto:webmaster@barnetu3a.org.uk)

### 6. Waiting Lists

- 6.1 If your group becomes over-subscribed, i.e. limited number of people if meeting in members' homes, or numbers too large for the subject matter, you are asked to keep a waiting list – preferably using BEACON.
- 6.2 Make sure the Groups' Coordinator is informed that you have had to create a waiting list so they can monitor the situation and make arrangements to start another similar group if numbers warrant that. If you use BEACON to maintain a waiting list the Groups' Coordinator can monitor the situation independently.
- 6.3 When receiving an enquiry about joining your group when it has reached capacity, please respond positively with information about a waiting list and/or put them in touch with the Groups' Coordinator to get information about other similar groups.

Contact the Groups' Coordinator: [groups@barnetu3a.org.uk](mailto:groups@barnetu3a.org.uk)

### 7. Help and Support

- 7.1 The Third Age Trust have provided several forms of help and support under the following headings:
- a) Ideas for Participative Learning and Learning Styles
  - b) Resources
  - c) Third Age Trust Networks
- 7.2 We have included more details of these as an Appendix to this guide. [Appendix A](#)

### 8. Policies and Procedures

- 8.1 Your committee and/or Groups' Coordinator will advise you of the u3a insurance arrangements as well as policies and procedures that you need to be aware of. These will include matters concerning:
- a) Finance
  - b) Data protection
  - c) Safeguarding
  - d) Equality, diversity and inclusion

- e) Accessibility
- f) Complaints
- g) Incident reporting

### 9. Copyright

- 9.1 Barnet u3a pays for a CLA licence allows some materials within limits for educational use within groups. The Trust also provides a PPL (Phonographic Performance) PRS licence to cover the playing of music and an MPLC licence to cover the showing of films. These are included in the fee that u3as pay to the Trust. There are limitations to each of these licences and if you are going to be using copyright material in any form, for example, printed, audio or pictures, please check the [support for u3as section of the national u3a website](#) for further details.

### 10. Problem Solving

- 10.1 Sometimes issues can arise within a group that disrupt its smooth running and can spoil the enjoyment for everyone. Don't leave a problem too long before trying to resolve it. Talk to your Groups' Coordinator or committee if you are unsure how to resolve the problem or just want someone to explore options with. You can also contact the [u3a Office](#) if you want to talk something through or check something out.
- 10.2 Issues between group members
- a) Where there is potential for friction it is advisable to begin by bringing it into the open. Either you or another person could try to facilitate a discussion either with the members concerned or with the whole group, but it is important that the facilitator remains neutral and non-judgemental. A group lead should not 'dismiss' a member of the group without due warning and good reason. If you cannot reach a resolution informally speak to your Groups' Coordinator or a member of your committee. If a situation does not resolve and becomes acrimonious, your committee may need to implement their complaints or disciplinary policy. The u3a office can be contacted for advice if necessary.
- 10.3 Other issues you may encounter:
- a) If a member's behaviour is regularly disturbing other members of the group, consult the Groups' Coordinator for help. If you feel comfortable dealing with the issue in the first instance, then you can do so. Alternatively, you can seek additional support from your Groups' Coordinator. Members of a group should let the group lead know if they no longer intend to stay with the group.
  - b) If there is a very serious problem in a session, it may be necessary to ask a member to leave for the remainder of the session. If this occurs, please contact the Groups' Coordinator as soon as possible after the end of the session.
  - c) If a member who is not able to cope independently, comes to a meeting without a 'carer', inform the Groups' Coordinator as soon as possible to discuss how best to resolve this situation.

Contact the Groups' Coordinator: [groups@barnetu3a.org.uk](mailto:groups@barnetu3a.org.uk)

**11. Accidents and incidents**

- 11.1 If an emergency incident happens during a group, you should call the emergency services as soon as possible. Report all accidents and incidents to your committee as soon as possible and complete an incident form. An [Incident Report form template](#) is available on the u3a website. It is important to have an accurate record in case of future problems relating to the incident. For example, if damage is caused to property by a member of the group, take full details, as it may be the subject of an insurance claim. The Third Age Trust provides insurance for group activities, and although personal accident insurance cover is not provided by the Third Age Trust, the insurance does cover all u3a members. Further details (including excess levels) can be found on the [u3a website](#).
- 11.2 For some groups you may consider it necessary to ask members to hold or provide emergency contact details. To request contact details, you need to complete a [legitimate interest assessment form](#) available from the u3a website.

Finally, a big thank you to you as the Group's Leader and for all you are and will be doing.