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## Guidelines for South Molton u3a Group Leaders

Welcome to the South Molton u3a Group Leader Guidelines. We hope you will find the Group Leader role rewarding and thank you for your enthusiasm and commitment.

The **South Molton u3a website** is mentioned at various places within these guidelines. The website can be found at: **[www.southmoltonu3a.co.uk](http://www.southmoltonu3a.co.uk)**

The title 'Group Leader' is used in this guide as it is the one most commonly used by members. However, people who help to create interest groups are known by many names. You might be a group leader, facilitator, convener, manager or organiser.

Please remember that:

- 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 teachers. They are all U3A members.

There are some mandatory instructions and some advice that we would like to share with you.

### **Mandatory, as required by The Third Age Trust:**

- It is necessary for you **to keep a note of attendees to each of your group sessions.** This means that we comply with the instructions which ensure the validity of our insurances (Personal Accident, Public liability etc).
- It is also advisable to have contact details. It is also necessary that you **keep a record of emergency contacts.**
- Should a member inform you that they have contracted a contagious disease, e.g. Covid, after attending a recent group session, you, as the group leader should inform the other members of the group who attended the same session.
- **Ensure that all attendees are Members of South Molton u3a** but bear in mind that we have an arrangement to allow people who have not yet joined the u3a to have the opportunity to attend any group on up to two occasions without obligation. Thereafter, they are expected to join.

**Accountability for monies collected:** Some groups require the collection of monies, perhaps for the hire of the venue, to cover the cost of supplies, or to pay for tickets for an event. The responsibility for the collection and payment of any monies remains with the Group Leader at all times.

To comply with the Charity Commission requirements each u3a group is required to consolidate the financial transactions of its Special Interest Groups in the Annual Accounts. The legal opinion, sought by The Third Age Trust, is that the assets and liabilities of each Special Interest Group are those of the u3a under which they operate.

In order to carry out our responsibilities in this respect, but at the same time to make it as simple as possible for each Group Leader the Treasurer (of South Molton u3a) requires a basic form to be completed at the end of each financial year (January to December inclusive) by Group Leaders, stating the following:

- How much money you have collected from Members of your Special Interest Group during the year.
- How much money you have paid out on behalf of the Members of your group during that year.
- How much money you have remaining in your Special Interest Group kitty at the end of the year.

**Please note:** Even if your group does not collect any monies, the form still requires completion and signing, filling in the boxes with zero.

If you are the Group Leader for more than one Special Interest Group you must complete a separate declaration form for each group.

The Treasurer will request the information at the end of each year. The form must be signed by the Group Leader, even if they have another group member who looks after the monies.

A copy of the form to be completed at the end of each year can be downloaded from the South Molton u3a website ([www.southmoltonu3a.co.uk/glfgd](http://www.southmoltonu3a.co.uk/glfgd)) or requested from the Treasurer.

**Risk Assessments:** A Group Leader **must** carry out a **Risk Assessment**. This should cover all meetings or activities and may vary, depending on the type of meeting or activity. Check with your Groups Co-ordinator, who will offer advice if required. Basic Risk Assessment forms are provided and can be downloaded from the South Molton u3a website ([www.southmoltonu3a.co.uk/glfgd](http://www.southmoltonu3a.co.uk/glfgd)) for a variety of risk environments. There is also a useful 'Frequently Asked Questions' document you can also download.

**Car Sharing:** Occasionally, groups require car sharing in order to facilitate the meeting at a non-local venue. Drivers are naturally concerned about the validity of their insurance, so we have shared an extract from The Third Aid Trust's Insurance FAQs in **Appendix 1** of these guidelines.

**GDPR:** Our legal obligations extend to the keeping of personal data (GDPR). Do not share any personal data outside South Molton u3a and, in fact, even within it. All personal information should be handled sensitively. For instance, should anyone ask you for another Member's contact details, it is better to take the enquirer's details and provide them to the person they wish to contact, so that they can make contact themselves, if they wish to do so. Should you require such information, you should go through the Membership Secretary, who will make any relevant decisions. If the Membership Secretary is not available, then the Secretary should be contacted. Their contact details are available on the website or in the monthly newsletter.

As a Group Leader **your contact details** will be included on the u3a newsletter, which is sent to our members on a monthly basis unless you inform us otherwise. If you choose not to share your own contact details be aware that it may impact your ability to run your group efficiently.

**Accidents, Emergencies or Incidents:** In the unlikely event of an incident/accident occurring, there are report forms available. These forms can be obtained from the Groups Organiser or downloaded from the website ([www.southmoltonu3a.co.uk/glfgd](http://www.southmoltonu3a.co.uk/glfgd)).

**Complaints:** Any formal complaints made by Members of any Special Interest Groups must be registered through the Groups Organiser.

Sometimes issues can arise within a group that disrupt the smooth running and spoil the enjoyment for everyone. Don't leave a problem too long before trying to resolve it. Talk to your Group Coordinator or Committee if you are unsure how to resolve the problem or just want someone to explore options with. You can also ring National Office if you want to talk something through or check something out.

If a complaint cannot be resolved within a Special Interest Group by the Group Leader the it should be escalated to Committee level where there is a more formal complaints procedure to be followed. Full documentation can be downloaded from the South Molton u3a website ([www.southmoltonu3a.co.uk/glfgd](http://www.southmoltonu3a.co.uk/glfgd)).

**Copyright:** The Third Age Trust subscribes to a number of licences to support interest group activities. Certain uses of copyright works are permitted under one of these licences. These are:

- The **MPLC Umbrella Licence** which allows audio-visual content (including DVDs, downloads and streamed materials) to be screened in a public location, for example a community hall or in a member's home as part of an interest group, provided admission is not charged. The Third Age Trust has an MPLC Umbrella Licence which covers all u3as and allows u3a group members to show all MPLC films for educational and entertainment purposes. The cost of the MPLC Umbrella Licence is included in Third Age Trust membership. It is automatically renewed by the Trust on an annual basis.
- The **PPL PRS Licence** (also called 'The Music Licence') allows a venue to legally play music through the radio, TV, other digital devices and during live performances. PPL, through PPL PRS Ltd, can license a venue operator or an individual music user, depending on the type of venue and how music is used. The Third Age Trust has a PPL licence for music use for u3as across all venues. This ensures that all recorded music used by u3as is licensed by PPL and eliminates the need to investigate whether the licences held by the venues (if any) are suitable to cover music used by u3as.
- A **Copyright Licensing Agency (CLA) Licence** allows the copying and re-use of extracts from digital and print books, magazines, journals and websites for educational and teaching purposes. This excludes many items such as maps, newspapers, sheet music and much more. Before copying any such material for distribution to Group Members you should therefore check that it permissible under the licenses we hold.

A more comprehensive overview of the CLA Licence conditions can be downloaded from the website ([www.southmoltonu3a.co.uk/glfgd](http://www.southmoltonu3a.co.uk/glfgd)).

Individual u3as can buy a CLA Licence via the Third Age Trust but please note that **South Molton u3a does not hold this licence**. If you think your group needs this licence then please contact the Secretary.

## General Advice:

The Group Leader is a **point of contact** and usually responsible for the following actions:

- To act as the main point of contact for group members.
- Booking rooms as required.
- A Group Leader can be an expert in a topic, but this is not a requirement. We all learn together. Should expertise be needed, it can be hired in and the cost shared by the group; for example: Local History, Sewing, Science etc.
- Collecting and paying out monies on behalf of group members.

The Group Leader does not need to be solely responsible for every part of the running of the group. Certain tasks may be delegated to another group member. For example, if money is collected for hire of halls, cost of tickets, payment of speakers or the like, a different person can take on these responsibilities, but remember that the ultimate responsibility for any delegated tasks remains with the Group Leader at all times.

**Newsletter:** The Newsletter is our main channel of communication and the Group Leader should ensure that information regarding date of meeting or change of venue should be updated through a monthly notification to be sent by email to the Editor at: **newsletter@southmoltonu3a.co.uk**

Copy deadline dates for each edition are shown on each page of the Newsletter.

**Booking a venue:** Various venues are available around South Molton and its surrounding area. Your interest group may need a specialist venue, but for the mainstream interest groups, the following venues have been used by other Special Interest Groups and are usually available:

Those that charge a fee for hire of the venue. This fee is usually shared by group attendees:

- The Methodist Hall, North Street, South Molton. Own car park.
- Filleigh Village Hall. Own car park.
- YMCA, Mill Street, South Molton. Public car park next to it.
- South Molton Baptist Church, New Road. Public car park next to it.

Those that do not generally charge but it is expected that attendees will purchase the refreshments offered by the establishment.

- The Quince Honey Farm Cafe, Barnstaple Road, South Molton, by arrangement with cafe management.
- The Coaching Inn, South Molton, by arrangement with management.
- The Town Arms, The Square, South Molton, by arrangement with management.

Some Groups may be small enough to meet in a Member's home, in which case an agreed small contribution towards refreshments should be made by each attendee.

The size of the venue or the nature of the activity may necessitate a maximum number being established for the group. **A waiting list** can then be set up should there be more demand than can be immediately satisfied.

**For Groups meeting for outdoor activities**, the top of the main car park in South Molton is frequently used to gather attendees before setting out.

If you are starting a new Group (or have new members in the group) you may like to consider the following.

- 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 – who is willing to help with the programme or keep the register.
- 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 when and where the group will run.
- Identify any accessibility needs that group members may have.
- Agree the costs for running the group and how much members will pay.
- Discuss how group members will communicate with each other bearing in mind data protection concerns.

### **If you need Support or Guidance:**

The South Molton u3a Group Co-ordinator is your first point of call, but there are also national advisers and support available through The Third Age Trust website. These include:

- **Subject Advisers:** Trust volunteers with specialist knowledge in a wide range of topics. Contact details on the National Website and in Third Age Matters.
- **External organisations:** Museums, libraries, schools, universities.
- **U3A publications:** Check the national website for the latest publications.
- **Networks, regions, neighbouring u3as** allow you to draw on experience from within the movement.
- **Regional Trustee:** will provide an overview of the region and a link to National Office.
- **National u3a Office:** The staff team are available Monday to Friday to offer support.

**Finally:** We trust you will enjoy your role as a Group Leader and find it rewarding, but do not hesitate to contact the Group Co-ordinator or any member of the Committee should the need arise.

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## Appendix 1.

### An extract from The Third Age Trust Insurance FAQs

#### 7. Transport/car FAQs

- **7.1 Am I insured when using my own car for a u3a activity?** You are not automatically insured when using your own car for a u3a activity, you will need to check this with your own car insurer.
- **7.2 Can u3a members offer lifts to other members and accept money towards petrol costs without compromising their car insurance policy?** Yes. But it is recommended that this is done as an informal arrangement between members.
- **7.3 Does the public liability insurance provide any cover whilst members are travelling in other members' cars or on a coach or minibus?** The question of accidents in motor vehicles is complex. Any accident arising from the driving of a vehicle would fall outside the scope of public liability insurance because motor insurance is an entirely separate matter and such incidents are covered under a motor insurance policy. This would normally include accidents which occur whilst mounting or dismounting a vehicle. However, on a coach where one member is injured by the actions of another member in circumstances which have nothing to do with the vehicle, it may be covered by the public liability insurance.
- **7.4 What happens if I parked my car in a recognised car park whilst on u3a activities and it is damaged?** The policy provided is an insurance against the legal liability of the u3a and so any claim would have to prove negligence in some way against the u3a, for example, it would have to be shown that any accident to a parked car, whether in a recognised car park or not, has been occasioned wholly or in part by the negligence of the u3a. This would not normally arise just because the car owner had permission to use a recognised car park at, for example, a local school or village hall. For a claim to succeed against the u3a, the car owner would have to show that he had been led to expect that his property would be protected and would have to show that the u3a or its agents, had been negligent in failing to provide the proper level of protection.