

# **Group Coordinators' Handbook**

## Introduction

This handbook provides the information and guidelines a **Group Coordinator** needs to set up and run a group activity. The **Groups Organiser** will provide you with updates to this document as necessary.

<b>Groups contact</b>	<a href="mailto:groups@bramhallu3a.org.uk">groups@bramhallu3a.org.uk</a>
<b>Chairman</b>	<a href="mailto:chairman@bramhallu3a.org.uk">chairman@bramhallu3a.org.uk</a>
<b>Treasurer</b>	<a href="mailto:treasurer@bramhallu3a.org.uk">treasurer@bramhallu3a.org.uk</a>
<b>Accommodation</b>	<a href="mailto:accommodations@bramhallu3a.org.uk">accommodations@bramhallu3a.org.uk</a>

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## 1. How do I start a new interest group?

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Anyone can start up a new group if a few members have shown an interest in a particular subject. You should first contact the Groups Organiser. They can help you contact those who may be interested via an announcement at the monthly meeting and through the newsletter and website.

The Groups Organiser will help you organise a meeting with interested members to see if it will be viable. At this meeting, you can discuss:

- what the members want to do
- the day and time of meetings
- the venue: the Groups Accommodation Organiser will help you find a venue if needed and will be able to advise you on the cost:  
**accommodations@bramhallu3a.org.uk**
- who will be responsible for organising and administrating the group
- any equipment that might be needed.

**\*NOTE: DO NOT sign any rental agreement yourself. Pass this through to the Treasurer.**

## 2. What are my responsibilities?

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You are reminded that the ethos of the u3a is 'education of the members by the members'. Members of the u3a are not permitted to be recompensed for their role as Group Coordinator, and outside tutors are not permitted. However, this does not apply to external speakers on a one-off basis.

- Ensure that you have up-to-date contact details of all members of your Group: address; phone number; email address and membership number.
- In April each year, check that all members of your group have a current membership card.
- Check new people joining the group are u3a members. If they are not already members they should be advised that if they wish to continue attending they must apply for membership.
- Before each meeting, check the venue is safe and fit for purpose. If you find any damage on arrival, or if any equipment has been left out by the previous user, make a note so that it can be reported to the hirer. If you have any safety concerns, do not continue with the meeting. Always ask the question, 'Is this room safe for my members?' Always ensure that the venue is left clean and tidy and remove any rubbish.

- If you are running a group that involves members taking part in any physical activity or exercise class make sure all your members complete a **Physical Activity Form** (Appendix A). All completed declaration forms should be retained by the Group Coordinator. **Physical Activity Forms must be reviewed every 3 years.**
- In the event of an accident or incident while participating in a Bramhall u3a activity, you should ensure an **Incident Report Form** (Appendix B) is completed and sent to the Chairman, without delay. Any potential claim for personal injury should be reported to the Chairman.
- The **Incident Report Form** will be held by the Chairman with the insurance documentation, in case of any future claim.
- In an emergency, where first aid is required, seek qualified assistance and dial 999 if necessary. If you have a smart phone it may be useful to download a free first aid app from the Red Cross. You can also get a leaflet from St John's ambulance. It is recommended that you attend one of the first aid courses put on from time to time.
- If damage is caused to property by a member of the group, complete the **Incident Report Form** and send it to the Chairman as soon as possible, as it may be needed in future if it becomes the subject of an insurance claim.
- Should you have a difficult member whose behaviour is regularly impacting on other members of the group, refer the matter to the Groups Organiser for assistance, and/or discussion on a course of action.
- If you have a serious issue with a member in a session, it is quite acceptable to ask the member to leave. Contact the Groups Organiser with details as soon as possible.
- If your group is full, contact the Groups Organiser.

### 3. **Health & safety**

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It is your responsibility to ensure the environment is safe and that equipment is used in a responsible manner. Electrical equipment used in hired buildings should be subjected to a Portable Appliance Test (PAT). If you are in any doubt, discuss with the Groups Organiser.

You should ensure that there is sufficient space for your activity and remove anything which could become a hazard. Any problem should be notified to the Groups Accommodation Organiser and the owners of the property.

Each member has been given an **emergency number card** with their membership card. If you are involved in any outside activities, sports, trips and holidays, you should ensure your members have this with them to be used in

the event of an emergency. This card is issued by the u3a national body – The Third Age Trust.

**Make yourself aware of the nearest fire escapes, first aid kits and telephone.**

## 4. Funding

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Financial control falls into three main categories:

### **Small groups in houses**

Either a small payment is made to the host for each meeting by each person attending to cover the cost of refreshments, or a slightly larger payment to cover other incidentals (e.g. photocopying), which would be handled as petty cash by the Group Coordinator. Any surplus cash will be paid to the Treasurer quarterly with a brief analysis of expenditure.

### **Larger group in a hall**

The addition of the rent for a hall adds complications. First, you must ensure that an extra contribution is levied to cover the hall rent. If this is levied at each meeting there is a risk of low numbers on occasions not meeting costs. Ideally, payment could be collected in advance by members to cover payment to hall owners. Such payments should be made through the Treasurer, both collection of contributions and payment to the hall owners. These payments could include an additional levy if attendance numbers are low. In each case, the same reporting arrangements would apply.

### **Group in a hall, with paid visiting speaker**

More care is needed to ensure the covering of costs with sufficient numbers attending, but it is recommended that all transactions are handled through the Treasurer.

**PLEASE NOTE: The Group Coordinator is not permitted to pay the venue owners or a visiting speaker via a personal bank account, even if remitting the net surplus to the Treasurer.**

It is essential to remember that all groups are expected to be self-sufficient, although this does not imply that funds belong to the group. All funds belong to Bramhall u3a.

For insurance and other practical reasons, a Group Coordinator should not hold more than £100 in cash on behalf of their group. If funds exceed this figure they should be passed to the Treasurer, who will provide a receipt by email.

All hall hire fees should be paid out of the u3a's bank account. It is essential that only Trustees/Committee Members enter into any contract with other organisations (e.g. arrangements to hire halls). In exceptional circumstances, and with the agreement of the Treasurer, it is possible for the user group to arrange the hire of a hall directly with the hall owners, on the basis that the booking is clearly understood to be on behalf of 'Bramhall u3a' and the invoice is sent to the Treasurer for payment.

In an effort to protect all concerned, it is preferable that members of the Committee, Group Coordinators and general members do not carry out transactions through their own bank accounts. Wherever possible, all transactions should be passed through the u3a Treasurer.

It should be stressed that all interest groups are operated on a non-profit basis and Coordinators should never be 'out of pocket'. With this in mind, the u3a Committee can subsidise any interest group by covering losses or costs, as these are directly related to the objectives of the u3a. Please discuss with the Treasurer.

## 5. Periodic financial return

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Whilst we would all prefer that there was no paperwork relating to the running of the numerous interest groups, the Committee must introduce several guidelines to protect all involved. To simplify the process, the Treasurer can provide a standard financial return form, which can be completed as an Excel spreadsheet or by way of a paper copy.

### Excel version

This is a simple spreadsheet, which can be completed on your computer and then submitted by email or printed off. Please contact the Treasurer for details. Calculations are automated.

Each completed return should be submitted to the Treasurer within 3 weeks from the end of each quarter, supported by the relative receipted invoices and any surplus cash.

All returns and any queries should be emailed to the Treasurer.

**Contact email:** [treasurer@bramhallu3a.org.uk](mailto:treasurer@bramhallu3a.org.uk)

## 6. Data protection

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The Data Protection Act 2018 (GDPR) governs personal data rights, including the way companies and organisations handle personal data.

The Data Protection Act affects how you, as a Coordinator, run your group. Please make yourself familiar with our *Privacy Policy* document and the *Data Protection* document. Both documents can be accessed from our website ([www.bramhallu3a.org.uk](http://www.bramhallu3a.org.uk)) via the links 'Privacy' and 'Data Protection' at the very bottom of the footer.

Simply put, things you need to be aware of are:

- These policies apply to your group as well as the u3a in general.
- Members of your group do not need to give you written permission to hold the data, as this has been covered by our membership and renewal forms, where members have signed to say they accept our policies.
- You can collect such data as that which will allow you to contact your group, such as name, address, email and telephone numbers and of course their u3a number, which you should check has been renewed when due.
- If members leave your group, or there has been no activity from a member for a maximum of 3 years (and probably 2 years is more realistic) you must remove their names and their personal information from your group listing.
- It is imperative you keep all data secure by taking sensible precautions, using strong passwords and, if used, secure cloud systems.
- When contacting the whole of your group by email, blind copy by putting your own email address in 'To' and members' addresses in 'bcc' (not cc) to ensure confidentiality.
- Please be aware of what would be considered inappropriate communication with your group, for instance sending members marketing or promotional materials from external sources, or giving details about your group to others.

## 7. Insurance

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All Bramhall u3a members are covered by the Third Age Trust insurance provided by the u3a National office, through their annual membership fee. In the event of an incident where a claim may need to be made, contact the Chairman.

The u3a National Office has now organised a **Tour Operators' policy** for groups. This covers Study Trips for groups going further afield with a purpose that is related to their group. For example, the History group visiting places of historic interest or the Walking group doing planned walks. It does not apply to trips organised by the Holiday Group or the Outings Group. Please notify the Chairman if you are organising a group trip that involves staying away for one or more nights. Any claims should be made via the Chairman.

## 8. Licences

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**Phonographic Performance Licence:** this allows us to use sound recordings within our organisation, subject to the Public Performance Licence (PPL) controls.

<http://www.ppluk.com/>

**Copyright Licence:** please contact the Chairman for further advice on this subject in view of potential legal complications.

<https://www.cla.co.uk/>

**Film Licence:** This has been obtained nationally by the u3a and covers most producers. Check with the Chairman for full details.

**DVD/Blu-ray and Downloads Licence:** We have an umbrella licence covering the use of all pre-recorded media in homes and other places where u3a activities take place.

## 9. What if I want to stop leading a group?

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We are all volunteers and circumstances change, so it is inevitable that you may reach a point where you feel unable to continue leading a group. Firstly, discuss this with your group and ask if anyone is willing to take over from you. This way, the continuation of the group should be straightforward. You should advise the Groups Organiser of the change so that the contact details can be updated.

If no-one volunteers, contact the Groups Organiser so that they can publicise the need and see if any other member is willing to take over.

**Do not cancel meeting rooms.** Advise the Accommodations Officer of the details of existing bookings and they will act if no one comes forward.

Complete any financial report and either hand it over to the new coordinator or to the Treasurer.

## 10. What if numbers begin to fall?

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If your numbers fall in your group and you are concerned about its viability, speak to the Groups Organiser. Publicity can be given through the newsletter and website.

If necessary, the group can be made an Open Group and other u3as within the North East Cheshire Network can be advised and they will advertise the group at their meetings.



People joining an Open Group do not have to join Bramhall u3a but you should confirm that they are members of another u3a.

If it finally becomes clear the group must close, then agree on a final date with the Groups Organiser. Don't feel a failure as people's needs vary over time and you will have provided a great service to the community.

## 11. Resources

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Bramhall u3a has a provision for storage. If you have items which require storing, or if you want to know what items are available, please contact the Equipment Officer:

**[accommodations@bramhallu3a.org.uk](mailto:accommodations@bramhallu3a.org.uk)**

We have various resources, some that are specific to groups and others that could be useful to the general membership as part of a group meeting or activity. If a resource is required, send an email to the above address with details of the request. Please allow a suitable timescale for the arrangements to be made. These details should include the period of requirement and the name of the person who will be responsible for the resource.

An annual review of resources will be undertaken, so if an item is purchased please send full details to:

**[communications@bramhallu3a.org.uk](mailto:communications@bramhallu3a.org.uk)**

in order for the resources list to be kept up to date.

# APPENDICES

## Appendix A

### Physical activity form

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If you are planning to take part in physical activity or an exercise class that is organised through a Bramhall u3a Group, you are required to complete the Declaration shown below and give it to the appropriate Bu3a Group Coordinator.

#### DECLARATION OF FITNESS TO PARTICIPATE IN A PHYSICAL ACTIVITY

I acknowledge that in participating in the following activity, I do so at my own risk and I shall be totally responsible for any health issues, which might affect my participation.

Name of Activity.....

Name .....

Bu3a M/ship No..... Signed .....

Telephone.....Date .....

**NOTE:** Review 3 years after signing

## Appendix B

### Incident report form

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Please note that this form is to be filled in by a member of the Committee, a Group Coordinator or the property owner. It should be sent to the Chairman in case of a claim to be retained for a period of 3 years even if a claim appears unlikely.

#### 1. Your details

u3a	
Name	
Position	
Email	
Telephone	
Address	
Postcode	

#### 2. Incident details

Date of incident	
Time of incident	
Where did the incident occur?	
Please state the reason for the injured person or damaged property being there	
Please describe the circumstances of the incident <i>Attach a sketch or photograph(s) if possible</i>	

### 3. Particulars of person(s) involved in the incident

(continue on a blank page if necessary)

Name	Email
Address	
Postcode	Telephone
Was he/she a member of your u3a on the date of the incident?	
Name	Email
Address	
Postcode	Telephone
Was he/she a member of your u3a on the date of the incident?	

### 4. Particulars of the injured person(s)

(continue on a blank page if necessary)

Name	Email
Address	
Postcode	Telephone
Was he/she a member of your u3a on the date of the incident?	
Name	Email
Address	
Postcode	Telephone
Was he/she a member of your u3a on the date of the incident?	

## 5. Details of injury

Describe the injury/injuries
Immediate action taken
Treatment at the scene
Admission to hospital
Ongoing medical treatment

*Section 6 is to be completed for any incident involving damage to property*

## 6. Details of damaged property

Describe the damage caused	
Estimated cost of repair or replacement	
Name of owner of damaged property	
Email	Telephone
Address	Postcode

*The remaining sections are to be completed for all incidents*

## 7. Name and contact details of any witnesses to the incident

Name
Contact details
Name
Contact details
Name
Contact details

## 8. Declaration

I/we declare that to the best of my/our knowledge and belief all the foregoing particulars are true and correct in all respects.	
Signed	Date
Signed	Date
Signed	Date

Last updated: March 2023