

Bramhall u3a

Group Leaders' Handbook

Key Information for Leaders to Set Up and Manage a Group

Please click in this box to access the Handbook.

Links to the **Data Protection** and the **Privacy Policy** can be found on **page 9**

Links to the **Safeguarding Policy** and the associated **Form** can be found on **page 17**

April 2025

This version supersedes all past versions.

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Key Contacts

Groups' Organiser	groups@bramhallu3a.org.uk
Chair	chairman@bramhallu3a.org.uk
Treasurer	treasurer@bramhallu3a.org.uk
Accommodation Officer	accommodations@bramhallu3a.org.uk

How Do I Start a New Interest Group?

Anyone can start a new group. You should first contact the Groups' Organiser who will help you contact members and/or arrange a meeting so you can gauge interest and see if it will be viable. At this meeting, you should discuss:

1. What the members want to do.
2. The best day and time for meetings.
3. The venue: Bramhall u3a's Accommodation Officer will help you find and advise you on the cost. *
4. How the group will be organised.
5. Any equipment needed.

*** DO NOT sign any rental agreement yourself. You must go through the Treasurer.**

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What are My Responsibilities?

You will need to:

1. Ensure that you have up-to-date contact details of all your group members: address, phone numbers, email address and membership number.
2. Check each April, when memberships are renewed, that all group members have a current membership card.
3. Check that new people joining your group are u3a members. If they are not, advise them that they must apply for membership. <https://www.bramhallu3a.org.uk/join-us>
4. If your group involves any physical activity or exercise, make sure all your members complete a **Physical Activity Form** (Appendix A). You should retain all completed forms. **Physical Activity Forms must be reviewed every 3 years.**
5. Each u3a member is given an **emergency number card** with their membership card. If you engage in any outside activities, sports, trips and holidays, ensure your members have this with them.
6. If damage is caused to property by a member of your group, complete the **Incident Report Form** (Appendix B) and send it to the Chair as it may be needed if the damage becomes the subject of an insurance claim.
7. Should you have a member whose behaviour is regularly impacting negatively on other members of your group, discuss this with the Groups' Organiser to decide on a course of action.

Guidance with this can be found in the [Safeguarding Policy Document](#)

1. If you have a serious issue with a member, it is acceptable to ask the member to leave. Contact the Groups' Organiser with details as soon as possible. Guidance with this can be found in Appendix C of the [Safeguarding Policy Document](#)
2. If your group is full, contact the Groups' Organiser.

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Health and Safety

Members

In the event of an accident or incident while participating in a Bramhall u3a activity, ensure that an **Incident Report Form** (Appendix B) is completed and sent to the Chair, without delay. Any potential claim for personal injury should be reported to the Chair. This form will be held by the Chair in case of any future claim.

In an emergency, where first aid might be needed, seek qualified assistance and/or dial 999 or 101 or 111. If you have a smart phone you can download a free first aid app from the Red Cross here: <https://www.redcross.org.uk/first-aid/first-aid-apps#General>.

St John's Ambulance offer health and safety advice online. <https://www.sja.org.uk/get-advice/health-and-safety-advice/> We recommend that you attend one of their first aid courses, but this is not essential.

Defibrillators are often available near or in our venues. Make sure you know where these are positioned.

Venues

It is your responsibility to ensure the environment is safe and equipment is used in a responsible manner.

Before each meeting, check the venue is safe and fit for purpose. On arrival, if you find any damage or any equipment left out by a 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?' After the meeting, leave the venue clean and tidy and remove any rubbish.

Electrical equipment used in hired buildings should have a Portable Appliance Test (PAT). If you are in any doubt, discuss with the Groups' Organiser.

Make sure there is sufficient space for your activity and remove anything which could be a hazard.

Any problem should be notified to the Accommodations Organiser who will consult with the property owners.

Make yourself aware of the nearest fire escapes and first aid kits and remind your members of these at the start of every meeting.

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Finance

The u3a ethos is 'education of the members by the members' – sharing skills and knowledge with each other. Leaders cannot to be recompensed for their role and external permanent tutors are not allowed. However, one-off external speakers may be recompensed.

All groups are expected to be self-sufficient, although this does not mean that funds belong to each group. All funds belong to Bramhall u3a.

For insurance reasons, leaders should not hold more than £100 in cash on behalf of their group. If funds exceed this, these should be sent to the Treasurer, who will provide a receipt by email.

All groups are operated on a non-profit basis and leaders should never be out of pocket. The u3a Committee can subsidise a group by covering losses or costs, as this is directly related to the objectives of the u3a. Please discuss with the Treasurer.

Small Groups in Houses

Hosts can ask members for a small payment at each meeting to cover the cost of refreshments. If a larger payment is needed to cover other incidentals (e.g. printing), handle this as you would petty cash.

Any surplus cash should be paid to the Treasurer quarterly with a brief analysis of expenditure.

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Larger Group in a Hired Venue

All venue hire fees should be paid from the u3a's bank account. Only Trustees and/or Committee Members can contract with other organisations, e.g. arrangements to hire a venue. However, in exceptional circumstances, and with the agreement of the Treasurer, it is possible for a leader to arrange venue hire directly with the venue owner. This must be done 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.

If you use a hired venue, you must collect money from your members to cover the hire. If this is done at each meeting there is a risk of low numbers not meeting the hire cost. It might be worth collecting payment in advance from members to cover the venue rent (e.g. every few months or term).

Ideally, monies should be returned every quarter, but this is flexible provided the Treasurer is aware of what is happening.

For example: Venue X, which is used by several different groups.

1. The accommodation officer sends Venue X a record of the different group usages at Venue X every two months.
2. Venue X then sends an individual invoice for each group to the Treasurer.
3. The Treasurer pays the invoices.
4. Leaders pay the Treasurer. This can be done by cash, bank transfer or cheque. The timing of this can be agreed with the Treasurer. For example, a leader may prefer to send in the money owed every six months.
5. The leader completes an account form for the Treasurer to give to the auditors.

Group in a Rented Venue with Paid Visiting Speaker

Make sure the likely number of members attending will cover all the venue and speaker costs. We recommend that all transactions are managed through the Treasurer.

Please note: Leaders may not pay venue owners or a visiting speaker through their personal bank account unless this is agreed with the Treasurer.

Financial Returns

The Treasurer can provide a standard financial return form, which can be completed as a paper copy or as a simple Excel spreadsheet which automatically manages the calculations. The spreadsheet can be submitted by email. Please contact the Treasurer for details.

Each completed return should be submitted to the Treasurer, supported by the relevant receipted invoices and any surplus cash.

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Insurance

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

The u3a national office has 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 Chair if you are organising a group trip that involves staying away for one or more nights. Any claims should be made via the Chair.

Licences

Phonographic Performance Licence: this allows us to use sound recordings, subject to Public Performance Licence (PPL) controls. <http://www.ppluk.com/>

Copyright Licence: There is a document about this on our website:

<https://www.bramhallu3a.org.uk/wp-content/uploads/copyright-and-licences.pdf>

Please contact the Chair for further advice in view of potential legal complications.

Film Licence: This has been obtained nationally by the u3a and covers most producers. Check with the Chair 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.

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Data Protection and Privacy Policy

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

The Data Protection Act affects how you run your group. Please make yourself familiar with our [Privacy Policy](#) and [Data Protection](#) documents. Both documents are accessed by the links at the bottom of every page on our website.

The main things you need to be aware of are:

1. These policies apply to your group and the u3a in general.
2. Members of your group do not need to give you written permission to hold their data, as this has been covered by our membership and renewal forms, where members have signed to say they accept our policies.
3. You can collect data which will allow you to contact your group: For example, name, address, email, phone numbers and u3a number.
4. 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 personal information from your group listing.
5. You must keep all data secure by taking sensible precautions, using strong passwords.
6. 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.
7. Do not make inappropriate communications to your members, for example sending marketing or promotional materials from external sources or giving details about your group to others.

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What if I Want to Stop Leading a Group?

It is inevitable that you may reach a point where you feel unable to continue leading a group.

First, discuss this with your group and see if anyone is willing to take over. This way, the continuation of the group should be straightforward. 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 leader or to the Treasurer.

What if Numbers Begin to Fall?

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

If necessary, the group can be made an Open Group. This means that other u3as in the North East Cheshire Network can join.

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 becomes clear the group must close, then agree on a final date with the Groups' Organiser.

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Resources

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 you have items which need storing, or if you want to know what equipment and resources are available, please contact the Accommodations Officer. Tell them when and what you need and who will be responsible for the resource.

Please allow a suitable timescale for the arrangements to be made.

We undertake an annual review of resources, so if an item is purchased, please send full details to the Accommodations Officer so the resources list can be kept up to date.

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Appendix A

Physical Activity Form

If you are planning to take part in physical activity or an exercise class that is organised for your Group, each participant must complete the declaration shown below and return it to you.

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

u3a M/ship No..... Signed

Telephone.....Date

NOTE: Review 3 years after signing

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Appendix B

Incident Report Form

An online version of this form to complete and send automatically to the Chair is available at <https://forms.gle/YdSchKRPaqSCkNkP8>

Either complete this online form **or** print and complete the form below. In either case, inform the Chair you are sending the form using the mailbox: chairman@bramhallu3a.org.uk and await instructions.

This form should be completed by a member of the Committee, or the Group Leader or the property owner. The form needs to be kept by the u3a, in case of a claim, 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 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 following sections must 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

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Please familiarise yourself with Bramhall u3a [Safeguarding Policy](#).

Bramhall u3a Safeguarding Report Form	Issue date: April 2025
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Adult at risk			
Surname		Forename	
Gender	Ethnicity	Date of birth	Marital status
Home address			
Post code			
Disclosure/suspicion date and time		Location of disclosure/suspicion	
Who received disclosure/had suspicion?			
Type of alleged abuse		Location of alleged abuse	
Description of alleged abuse			
Was it necessary to call 999? Yes/No			
If 'Yes', what advice was given/action taken? Date & time			
Name of person reporting			
Role (Eg: u3a member/group leader/committee)			
Signature			Date

Committee member informed		
Name	Role	Date & time
Committee decision		
Is further action needed? Yes/No		
If 'Yes', state referral details		
Date of decision		
Date of referral		
Reason for decision		
Date record (paper copy) passed to Chairman for secure retention		
Date record to be destroyed		
Chairman signature	Date	Time

This Safeguarding report form must not be emailed. Information contained in this document should be used only for the purposes of implementing and monitoring Bramhall u3a's Safeguarding Policy and procedures. The information must not be copied, transmitted or in any way divulged without the permission of Bramhall u3a

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