



Droitwich Spa and District

## Group Leaders' Handbook - Part 1 Starting and Running an Interest Group

### [Abstract](#)

The document provides guidance and advice on how to start and run a Group in accordance with Droitwich Spa and District u3a Constitution, customs, and practices.

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## Additional Information

This handbook should be read in conjunction with:

- Handbook Part 2 - Communicating with Members
- Handbook Part 3 - Data Protection Issues
- Handbook Part 4 - Concerns and Guidance
- Handbook Part 5 - Equality, Diversity and Inclusion
- Handbook Part 6 – Accessing Members ICE Contact Details

Additional information can also be found on the Droitwich Spa and District u3a website.

## Definitions

Executive Committee:	An elected Group of members that oversee the operation of Droitwich Spa u3a in accordance with its constitution.
Group:	An undefined number of members sharing a common activity on a regular basis in accordance with our constitution.
Group Leader:	A member or members of a Group that facilitate and / or act as administrator for meetings.
Third Age Trust:	National Body for the u3a
u3a:	Droitwich Spa and District

## Document Review

This document will be updated if there is any change to the Law or associated Guidance documents or from advice from the Third Age Trust without unreasonable delay and

disseminated, as necessary. Irrespective of the foregoing this document should be reviewed bi-annually to ensure all advice and guidance is accurate.

This policy was adopted on: 1<sup>st</sup> May 2024

Review date: 30<sup>th</sup> April 2026

Policy Amendment – 8<sup>th</sup> August 2026 Section 6.1 Money held by Group amended.

Document Review date 30<sup>th</sup> April 2028.

Policy Amendment – 15<sup>th</sup> November 2026 Section 5.2 and addition of Appendix 1. Both relate to "Paid for" venue hire.

Document review 15th November 2028.

## **1.0 Introduction**

Droitwich u3a would be much reduced were it not for the contributions made by our Group Leaders and our u3a wishes to be as supportive to Groups and Group Leaders as is practicable.

The aim of this handbook is to both support new Group Leaders with their initial organisation, as well as to provide the leaders of more established Groups with practical advice and guidance. The handbook aims to cover the many possible issues and questions that may arise and offers advice rather than be authoritarian. However, in some areas where our u3a is affected by legislation, the Executive Committee Members have a duty to ensure that we operate within the law. In such cases the advice is more prescriptive, as is the case where the Third Age Trust has identified and recommends that u3as should adopt a particular "best practice" approach.

Droitwich u3a is an educational charity, and its purpose is, according to our constitution: "The advancement of education and, in particular, the education of older people and those who are retired from full time work by all means, including associated activities conducive to learning and personal development." hence, our constitution permits us to engage in many different sorts of activities for the benefit of the membership.

## **2.0 Structure of Interest Groups**

There are as many ways of running an interest Group as there are people to run them, and there is no "standard structure" for how Groups are organised. The only specific policy of Droitwich u3a is that each Group should be, as far as possible, financially self-sustaining. This policy exists to keep our membership fee at a reasonable level.

Some Groups operate a process of shared learning, where everyone in the Group is involved in the learning experience. An example of a Droitwich u3a Group of this form is the Art Appreciation Group. In this Group, members take it in turn to host the Group in their home, and the host leads a presentation of an artist or an art movement of their own choice. Thus, everyone is involved in teaching as well as learning something new about art. Such an arrangement does not require everyone in the Group to be an expert in some area of art - it just requires that everyone in the Group is prepared to do some research on some aspect of art that they are interested in, or that they think might be of interest to the other members of the Group. In such Groups the Group Leader doesn't "lead" the Group in a conventional sense, but rather acts as a co-ordinator for the activities of the Group. They may also keep a record of where the Group is next meeting and the subject matter of the presentation, plus act as the contact person for the Group.

Other Groups engage speakers, possibly from within the Group, or maybe from outside of the Group, to give a talk on some area related to the purpose of the Group. An example of a Droitwich u3a Group of this form is the Math's and Science Technology Group. In such Groups, members meet at a hired venue and the Group Leader acts as a facilitator and administrator for each meeting rather than providing subject knowledge. While in other Groups it is usual for the Group Leader to be knowledgeable about the subject area - so that they can arrange an appropriate series of talks or activities covering the different areas that the members might be interested in. This arrangement is not essential, and the Group Leader could be any member of the Group who is prepared to arrange, or even share in the arrangement of the talks, and act as the contact / administration person for the Group.

Other Groups involve an expert in a particular subject imparting their knowledge or skills to the other Group members. Examples of these Group are Beginners' Bridge and Line Dancing. In such Groups it is usual for the subject expert to be the Group Leader so that they can decide on an appropriate frequency of the Group meetings, what topics or activities need to be covered at each meeting and to change the plan if necessary. Again, this is not essential, and the Group could operate with the expert still deciding what to do at each meeting and the Group Leader as another member of the Group who is the contact / administration person for the Group.

### **3.0 How to Start an Interest Group**

If you have some special knowledge or interest that you think other members might like to share, then why not start a new Group. Groups are the fundamental to Droitwich's u3a success of offering a diverse range of subjects and activities for members to participate in.

A good starting point is to discuss your idea with the New Group Coordinator, their details and contact details are available from the website, and they will assist you in carrying your idea forward.

When considering when to hold meetings of the Group you should consider avoiding the monthly members meeting which is held on the afternoon of the third Monday of each month.

An application can be made to the Committee for setup funding. The funding can be used for any purpose that assists with the subject matter meeting Group members expectations.

#### **3.1 The following are items you may wish to consider:**

Who is the potential target membership for the Group, and when and how often the Group might meet. A timetable of Group meetings is shown on the Droitwich u3a website - so think about a day, time and frequency for the Group meetings so that it will not clash with other Groups that are likely to include potential members for your new Group as members might wish to belong to both Groups.

Most members prefer Group meetings on weekday morning or afternoon, but there is nothing to stop you having meetings in an evening or at a weekend.

It is helpful to think about an initial programme that you intend to organise, though the details of this could, and usually should be determined by the members as the Group develops.

The initial programme will assist in developing a broad idea of the purpose and objectives of the Group and will help you write a suitable description or article to advertise it on the website, and/or in the newsletter. Remember recruiting members to a new Group, or to expand an existing Group is usually done via the website and the newsletter so having a clear purpose for the Group and articulating this clearly will encourage membership.

It is essential that accurate membership names and details are maintained for each Group and Droitwich u3a can record this information in the Beacon Administration System. The Group Leader or a member of the Group should be responsible for maintaining this record. Protection of members details is essential and further guidance can be sort from the Group Leaders' Handbook - Part 3 Data Protection Issues.

### **3.2 Communication and Attendance:**

The following highlights a number of general points in regard to Communication and Attendance within the Group:

Communicating effectively with the Group is essential and this can be done via several ways including one or more of the following:

- Droitwich u3a Website
- Email system within Beacon
- Personal email list
- WhatsApp or similar social media

When Communicating with the Group try to be democratic, ask for and include members' ideas as Groups do not belong to the Group Leader, but to the members of the Group as a whole.

It is considered good practice that an attendance list is maintained for each meeting. If a member of the Group does not attend regularly then there may be an opportunity for another member to attend and future guidance regarding this situation can be found in Group Leaders Handbook 4 – Other Matter Section 1.0 Poor Attendance by Group Members.

For the benefit of all the members and those enquiring about membership, it is essential that you provide the Groups' Co-ordinator with up-to-date information about your Group from time to time.

Future information is available from the Group Leaders' Handbook - Part 2 Communicating with Group.

### **3.3 Initiating a New Subject Area Group:**

Sometimes members would like to learn something new about an area but don't have the knowledge or confidence to be able to start a Group themselves. The New Groups' Co-ordinator keeps lists of members who are interested in the formation of new Groups and when there is enough to start-up the Group, the Groups' Co-ordinator will arrange a

meeting of these members to see if some way of starting the Group can be found. In such cases the Groups' Co-ordinator acts as a facilitator for the creation of the new Group and may sometimes act as the Group organiser for one or two meetings to get the Group started. However, this arrangement must not be permanent, and for the Group to continue, someone within the Group will need to become the Group Leader.

#### **4.0 How Do Members Join an Interest Group**

Members learn about Groups through a variety of media, this includes word of mouth, Droitwich u3a website, the bi-monthly newsletter and/or advertising the Group via an email.

The Droitwich u3a website is the preferred source of key information about each Group.

The web site should include all key information about each Group as follows:

- A meaningful name of the Group.
- Brief description of the Group's activity.
- A Group's minimum requirements – such as reading music.
- The days, times, frequency of each meeting.
- The place where the Group meets.
- Any costs associated with attendance.
- A brief description of how the Group operates.
- The Group's contact details.
- The name of the Group Leader or Leaders.

It is the Group Leader's responsibility to make sure that the website information is complete and up to date plus reviewed periodically. Any changes should be emailed to the Website Administrator with a copy to the Groups' Co-ordinator.

A u3a member wishing to join a Group should start by contacting the Group Leader. The Group Leader should respond in a positive manor to the request to join a Group. It is recognised that some Groups are unable to take new members immediately normally due to either existing membership numbers, the subject, or a venue restriction. The Group Leader should maintain a waiting list and update Beacon accordingly.

If a member that does not have access to the internet and wishes to join a Group, they should telephone the Groups' Co-ordinator who in turn will pass on their details to the relevant Group Leader.

#### **5.0 Choosing a Venue for an Interest Group**

The Group Leader will need to consider what the most appropriate venue is for the size of the Group. The appropriate venue is subject to several factors which may include:

- The size of the Group
- The nature of the Groups activity
- Venue Location
- Equipment requirements including Internet connectivity.
- u3a resources or similar
- Accessibility and inclusiveness

As a Group can commence with a small number of members consideration should be given to holding meetings in the Group Leaders or a member of the Groups home. Later, if the

Group expands the Group can find a larger venue. A comprehensive list of venues is available from the Group Coordinator.

### **5.1 Using a Private Home**

The cost of hiring a venue for a small Group can be a deterrent to the Group forming. If a private home is used, then it is only right for the Group to ensure that the host is reimbursed for any refreshments and other benefits that may be provided. It is suggested that a charge of 50p per person per session is made to cover refreshments, such as a drink of tea or coffee and biscuits.

### **5.2 Booking a Venue**

If the Group is too large to meet in a private home or access to specialist equipment is required, then consideration should be given to hiring a venue. Some venues such as some public houses and cafes do not make a formal charge for the use of a room but instead ask that all Group members to buy a drink. Please ensure that the members of the Group comply with this request. Other venues make a charge; either by the hour or by the session (usually a morning, afternoon, or evening session).

The Groups' Co-ordinator has access to a list of "free" and "paid-for" venues, the amounts that they charge and a contact person for booking the venue. For insurance purposes "paid for" venues must be booked in the name of "Droitwich Spa and District u3a" and the Group Leaders as the contact point. It is the responsibility of someone within the Group to book the venue and to ensure that any invoices are paid promptly. Once a "paid for" venue has been agreed Appendix 1 must be completed and approved by the appropriate Committee members.

Note that some "paid-for" venues offer a discount for charitable organisations such as our Droitwich u3a (our Registered Charity Number is 1180564). Ensure that the venue can cater for all your requirements in terms of capacity, amenities such as kitchen and car parking or special equipment such as a piano, projector and screen? Some "paid-for" venues do make an additional charge for these items.

### **5.3 Cancellations and Change of Venue**

Should a Group meeting need to be cancelled or moved, for whatever reason, the Group Leader should ensure that the venue is informed with as much notice as possible. The Group Leader should also ensure all the members of the Group are informed.

If the alteration arrangement is temporary, the information on the website should not be changed. However, if the change to the venue, day, time, or frequency of meetings is permanent then the Group Co-ordinator and Website Administrator must be informed so that information on the website can be up to date.

Note: Because of the cancellation, the Group Leader might also need to consider the cost implications, many paid-for venues will allow a Group to rearrange a cancelled meeting at no extra cost. However, this does depend on the terms of hire for the venue, and the nature of the relationship you have with the venue staff.

## **6.0 Interest Group Finances**

In accordance with Droitwich u3a Constitution each Group should be self-financing however Specialist Equipment could be purchased on behalf of the members as a whole if approved by the Committee.

The Group Leader or a recognised member of the Group should be responsible for maintaining adequate and accurate records of transactions – further guidance can be obtained from Droitwich u3a Treasurer.

Good financial governance is critical to maintain the reputation of the organisation therefore the following guidance is provided:

### **6.1 What to do with Group Money**

A Group is permitted to hold cash collected from the Group members so long as the balance held is not greater than £200.00.

You are not permitted to collect money via bank transfer or hold money in your own bank account or to open a separate bank account for such purposes.

Should the money held by a Group exceeds £200.00 it should be passed to the Treasurer for banking. All such monies held by the Treasurer belong to the Group and will not be spent on general u3a expenses.

A record of all money collected, and payments made (including copies of receipts, invoices and confirmation of payments made), whether for room hire, the purchase of equipment, or any other purpose, must be kept and presented to the Treasurer at the end of March each year, for inclusion in the Droitwich u3a accounts.

Note: It is not necessary to provide any information to the Treasurer or account for money paid by members for refreshments provided at a members' home providing they are the only costs associated with Group meetings.

Droitwich u3a financial year runs from 1st April to 31 March.

Any balance of accounts for a Group at the end of the financial year may be rolled over into the following year so long as there is a reasonable expectation that the monies will be spent. Alternatively, Groups may decide to distribute some or all of the balance to the members of the Group. Any money collected by a Group, or discounts available to a Group, or money returned to the members of a Group or similar, should be used fairly for the Group as a whole.

### **6.2 Payments for Room Hire**

For Groups that need to hire a room, you should arrange to pay for the room hire and collect sufficient attendance money from the Group members to cover this cost.

If the Group hires a room the Group Leader or a recognised member of the Group should make arrangements to pay the room hire charge without delay. The Group Leader or a recognised member of the Group should endeavour to collect sufficient attendance money from the Group to cover all reasonable costs.

Please note that Droitwich u3a has a policy to indemnify a Group Leader against room hire losses that might occur through subsequent lack of attendance, so long as the Group Leader had made reasonable provision to attempt to cover the cost of room hire over the financial year.

### **6.3 Purchase and/or Use of Equipment**

From time to time, a Group may decide that it needs some specialist equipment. Consistent with the policy that each Group should, as far as possible, be financially self-sufficient, it is normally expected that Group members should bear the cost of new equipment.

The Committee will consider, on its merits, any request to subsidise the purchase of equipment by a Group. Such a request is more likely to be looked upon favourably if the equipment is also appropriate for use by other Groups, and/or is necessary to facilitate the start-up of a Group. Any such equipment should be held by a member of the Group, normally for use by the members of that Group, but legally it is the property of the u3a as a whole. Any such equipment should be recorded in an inventory of equipment for insurance purposes by the Treasurer.

### **6.4 Payments for Speakers etc**

Group Leaders should be aware of one of the u3a guiding principles, namely that no salary, fee, or financial reward should be paid to any u3a member for teaching other members, counselling them, or helping them in any way. However, if the member providing the service is from another u3a some distance away, you may pay them legitimate travelling expenses.

An outside speaker, coach or tutor providing a one-off talk may be paid a fee and/or expenses by the Group. If the speaker, coach or tutor is to be used on a regular basis, such as coaching tennis or similar, then they will be retained in accordance with Group Leaders' Handbook – Part 4 Concerns and Guidance Section 8.0 Paid Professional Tutors or Coaches.

### **7.0 Arrangements with Other Local u3a's**

Droitwich u3a has a reciprocal arrangement with the u3as in the Cotswold Link, which is a network of u3as in Worcestershire, Herefordshire, and Gloucestershire, see: <https://u3asites.org.uk/cotswold-link/> and the arrangement also extends to some of our other neighbouring u3as. This means that members of Alcester, Bromsgrove, Evesham, Malvern, Pershore, Redditch, Worcester, or Wyre Forest u3as may attend ONE of our interest Groups on a regular basis without having to be a Droitwich u3a member. However, if a Group has a waiting list, members of Droitwich u3a should have priority.

If a member from another u3a attends your Group on a reciprocal basis, please check regularly (ie at least once each year) that they have a valid membership card for their u3a. So long as their attendance has been recognised by our u3a, they are also covered by our insurances (in just the same way as if they had been one of our members).

Of course, you might think you know what "recognition" means, but the interpretation made by an insurance company might be quite different. So, it is best to report such attendees to the Membership Secretary or the Beacon Administrator, who will supply you with a Reciprocal Membership Form. The form requires some contact details – name, email address, postal address, mobile and landline telephone numbers, and the name of their u3a.

Please ask the attendee to complete the form and arrange for its return to the Membership Secretary, who will then record them as a Reciprocal Member of Droitwich u3a. The attendee will be given a membership number, but they are not issued with a Membership Card and do not have to pay us a Membership Fee. We do not make any administrative charge associated with such a membership, but they are then formally part of our membership for insurance purposes.

If a member of another u3a wishes to attend more than ONE Droitwich u3a Group, they must join Droitwich u3a as a full member. The reciprocal attendance arrangement also implies that members of Droitwich u3a may be able to attend ONE interest Group of a neighbouring U3A on a regular basis without having to become a member of that u3a.

### **8.0 Arrangements for Members of the Public**

Although your Group meetings are for u3a members only, members of the public who are potential new members are permitted to attend just once for a taster session. This might be one attendance at a Monthly Meeting or a meeting of one of our Groups. In the latter case the person is expected to contact you beforehand and their attendance at a Group meeting is at your discretion and should be recorded.

### **9.0 Droitwich u3a Equipment**

Droitwich u3a owns several items of equipment that the Groups may use, including:

- laptop computer
- projector with connectors for displaying images from a computer
- lockable steel box (mainly used for storing the projector)
- projector stand
- 2400 x 2400 mm foldable projection screen
- two flipchart boards with pens and paper
- folding noticeboard
- rubber stamp and ink pad (for "Property of Droitwich Spa U3A").

Currently these are held at various locations and the inventory is held by the Treasurer and Chairman, either of whom should be approached for further information.

Droitwich u3a electrical equipment will be checked and PAT tested in accordance with the Electrical Equipment Policy. u3a equipment should not be used for non-u3a purposes. Equipment owned by a third party must be safe for use and take no responsibility for its condition or integrity.

### **10.0 National, Regional and Local u3a Resources**

The Third Age Trust has many resources that Groups have access to, in order to help in the way that they operate. For further information see the "Learning Resources" section on the Third Age Trust website at: <http://www.u3a.org.uk/>.

These resources include an extensive collection of DVDs & CDs available for all u3a Groups to borrow free of charge (except for the cost of return postage), access to a National Advisor for the most popular subject areas who can recommend u3a and other sources of information and is available to offer specific advice, and selected articles from the Sources online magazine providing examples of best practice for Group Leaders and potential leaders of Groups.

The Third Age Trust has also recently announced a future expansion of these resources, to include Technology Entertainment and Design (TED) talks and access to Massive Open Online Courses (MOOCs). The Third Age Trust and the Cotswold Link also run occasional workshops on common subject areas, mainly intended for Group Leaders.

Droitwich u3a has a policy of supporting our Group Leaders who wish to participate in such workshops. Such support will usually extend to payment of your attendance fee at such a workshop and the associated travel expenses, subject to any financial restrictions that might apply. The Droitwich u3a Chair or Treasurer can provide more advice about this and can approve such expenditure on behalf of the u3a. Workshops are also run by the West Midlands u3a Region, see: <https://u3asites.org.uk/west-midlands/> but they tend to be concerned with u3a organisation and management rather than the subject areas of Groups.

### **11.0 Further Guidance and Advice**

If a Group Leader requires help or if in any doubt, then contact the Groups' Co-ordinator, Chair or Treasurer who will in the main be able to answer your questions and if they cannot, they will find someone who can! Enjoy being a Group Leader! Remember, we only exist through our volunteers!

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**Appendix 1 – “Paid for” Venues**

**Droitwich Spa & District u3a**

**Authorisation for Group “Paid for” Venues**

Group Name		
Venue		
Postcode		
Name of Venue Contact		
Email of Venue Contact		
When are Meetings Held?		
Cost of Room Hire per session		
Has the venue been informed that the booking is on behalf of Droitwich Spa and District u3a?	Yes	No
Hire Commencement Date		
Group Leader	Name	Signature
Contact Details	email	
Approved by Trustee	Name	Signature
Date		

Note: If the circumstances change, please resubmit this form to Committee for Approval.