

**University of the Third Age**

**St Albans**

# **Groups**

**Information and Guidance for Group  
Organisers and Members**



THE UNIVERSITY OF THE THIRD AGE

[www.stalbansu3a.org.uk](http://www.stalbansu3a.org.uk)

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# 1. Why have Groups?

The Third Age Trust (TAT) tells us that the word 'university' is used in its original sense of people coming together to share and pursue interests, activities and learning in all their forms.

A TAT guiding principle says: U3As offer activities which aim to satisfy the widest possible range of interests: educational, cultural, recreational, physical and social.

Groups are a means of doing this and are at the heart of all U3As.

Groups are autonomous. The guidelines in this book are not prescriptive, but some useful procedures and terminology have been developed in St Albans which have proved effective for establishing and maintaining vibrant Groups; these are shared below.

# 2. Managing Groups

The U3A Groups Coordinator for St Albans is a facilitator who receives and initiates ideas for Groups and promotes them at Members' meetings, on the website and in the *U3ALife* Newsletter.

The Groups Coordinator provides support and information for Group Organisers, communicating, usually by email. He/she reports to the Executive Committee of which he/she may be a member, providing a communication link between Groups and the EC.

In addition to the advice in this booklet there is further guidance available, referred to throughout this booklet, on the St Albans U3A website <https://u3asites.org.uk/stalbans> under the Publications tab.

### **3. Group Organisers**

Individual Groups are managed by Organisers who volunteer their time and sometimes their knowledge and/or skills to help others participate.

Most Group Organisers adopt a coordinating role, providing the link between the Group members and the U3A Groups Coordinator, while members of each Group normally take collective responsibility for the Group's activities.

Some Organisers may have more of a leadership style; they are members who have a body of knowledge/skills or experience. They may take individual responsibility for the activities and plan a programme, usually after discussion with members.

### **4. Starting a Group**

Any member may suggest a new interest or activity Group. They give details of the proposed Group to the U3A Groups Coordinator who advertises it. The Groups Coordinator may also receive ideas from other sources.

In either case the Groups Coordinator collects names and when the number is viable calls a meeting to launch the Group. The Group and contact link is then added to the List of Active Groups on the website and in the *U3ALife* Newsletter.

Since the U3A is about self -help and sharing knowledge, the use of paid tutors is to be avoided wherever possible. See Section 19.

## **5. Launch Meetings**

### **a) Venue**

The Groups Coordinator attempts to find a date and time suitable for all or most of the proposed Group members and advises prospective members of the date and time of the launch meeting. He/she asks for someone on the list to volunteer to host the meeting; alternatively he/she may arrange the meeting in a local venue such as a café.

### **b) Holding a Launch Meeting**

The Groups Coordinator Organiser will normally chair the meeting.

Members introduce themselves and share any previous experience of the proposed activity and expectations of the Group.

Volunteers are sought to be the Organiser and possibly a second person as an assistant.

Normally the members will be expected to host/research activities/visits/meetings on a rota basis.

The Group agrees general aims and when/how often/where the Group will meet.

Resources, housekeeping and travel may be discussed, if relevant and agreed at the meeting and /or circulated to all members by the Organiser, given to new members and reviewed annually.

## 6. Group Organisation Guidance

- a) Agree what day and time to meet and emphasise the importance of members arriving on time.
- b) Decide on ideal membership size for the Group – minimum/maximum numbers
- c) Agree on a non-attendance policy (e.g. four consecutive meeting missed or less than 50% attendance over 12 months, without reason or contact being made, would result in the member leaving the Group to allow others to join. Obviously there may be exceptions made if absence is due to illness, family problems etc.
- d) Build in an **informal review session** after a few months and then at least annually. This will help to sustain the Group and ensure that members' expectations are met.
- e) **Email buddies** should be appointed for members not on email.
- f) **Hosting:** Establish whether everyone is required to host a meeting. Some members may not have sufficient space in their home to accommodate all the members. If this is so, establish a policy on costs for refreshments.
- g) **Travel:** Establish how members who do not drive will attend meetings; if other members are providing transport, set up a policy to reimburse the driver for petrol costs. U3A guidance on this is that a driver can ask for a contribution (to be made equally by all those in the car) towards mileage of 25p per mile. (For clarification, mileage covers fuel, wear and tear and insurance costs).

- h) It may also be convenient to car-share, especially if any activities involve driving any distance, in which case, members may decide to take turns to drive.
- i) If a **chairperson** is appointed (e.g. in discussion or self-help learning Groups) make it a time-limited appointment; this prevents one leadership style predominating.
- j) **Research buddies** – where the Group activities require some research or information gathering, ensure that this activity is evenly distributed among the members with all members sharing research activities. Members may like to work in pairs to research events. The Organiser may need to establish this.

## 7. Group Organiser's Responsibilities

- a) Confirm that all members of the Group are happy for their details to be stored and shared electronically with other members. Until all members of the Group agree that their data can be shared it is recommended that **bcc** (blind copy) is used when sending emails; subsequently, the Group can decide what level of confidentiality they prefer. See Data Protection.
- b) Give all members of the Group an electronic copy of the Group list; keep this up to date. If any member doesn't have a computer, give them a paper copy.
- c) Provide Groups Coordinator with an electronic copy of members' names and membership numbers
- d) Create a Group email contact Group (help is available for this).

- e) Collect members' ideas/contributions and form a programme where appropriate.
- f) Organise review sessions.
- g) Keep a register of attendance.
- h) Notify and remove non-attenders according to Group agreed practice.
- i) Follow current accident procedures. See Starting a Group. It is strongly recommended that emergency details/medication details of all members are kept. This is essential for Groups engaging in physical activities. (If confidentiality is an issue, a sealed envelope containing relevant details could be carried by the member and only opened in an emergency).
- j) Inform the Groups Coordinator of names on any waiting list. When waiting list numbers are viable, the Groups Coordinator will initiate another same-interest Group.
- k) All Groups are invited to send a representative to the 'Getting to Know You' events. It is strongly recommended that Groups with vacancies send a representative to these events which provide an opportunity to recruit new members.
- l) Annually, check that Group members have renewed their membership. Only members of St Albans U3A can join St Albans U3A Groups and insurance can be invalidated if non-members attend more than twice (further advice available from U3A Groups Coordinator).



- m) Advise U3A Groups Coordinator of new members and members who have left the Group on an ongoing basis and send annual confirmation of Group membership.
- n) Send the Groups Coordinator updated details of the Group to be put on the Group's web page and included in the *U3ALife* Newsletter, e.g. vacancy status, programme, photos.
- o) Keep a record of the Group's activities and any useful details like travel research. Same-interest and new Groups can then benefit from shared experiences.

## **8. Data Protection**

Data must be obtained directly from each member of the Group and not from central sources (however information can be checked with the Groups Coordinator or the responsible trustee.)

Only data which is needed by the Group should be kept. Further guidance can be obtained on the website under Publications. The organiser should use the bcc feature when communicating by email to group members unless agreement among members is obtained to reveal email addresses to other group members. In most cases this would be the case but should not be assumed.

Email addresses supplied by members of a Group for communications about that Group's activities may be used for that purpose only. No non-U3A business may be circulated using them. Members wishing to involve U3A – or any Group or Groups – in matters such as (charity) fundraising, petitions or (local) campaigns should ask the Executive Committee to decide whether they fall within U3A's remit.

## 9. Vacancies in Groups

On request, the U3A Groups Coordinator will advertise vacancies on the website, via emails and at Members' meetings and through Groups News.

## 10. Waiting lists

It is in the spirit of the U3A that members should be in Groups of their choosing as soon as possible. Therefore all Group Organisers should inform the Groups Coordinator of names on their waiting list.

The Groups Coordinator holds the *main* waiting list for that activity. This allows a new Group to be formed more quickly. As soon as numbers are viable, another Group should be started. The U3A Groups Coordinator will assist with this See Starting a Group

## 11. Joining a Group

Only paid up members of St Albans U3A are entitled to join and participate in a St Albans U3A Group. Membership of other U3As **does not** entitle someone to join a St Albans U3A Group: they must also join St Albans U3A.

Contact the Organiser using the email link on the web page or the telephone number found in the *U3ALife* Newsletter and/or on the List of Active Groups displayed at Members' meetings.

On request U3A Groups Coordinator can provide a current master list of Groups and Organisers' emails/phone numbers.

## **12. Group Members' Responsibilities**

When you join a group where a minimum number of members is needed for its success and the costs are shared by the members, such as Table Tennis, you should make a commitment to attend regularly or the group will fail and other members may incur extra costs.

Members joining groups engaging in outings should be prepared to contribute ideas and take their turn in leading group activities.

Group members should be aware that it's only fair to circulate the responsibilities of the Group Organiser from time to time and not expect one person always to do everything. From time to time, therefore it is wise to circulate the role of the Organiser within the group.

## **13. Problems that can arise**

It is not the Organiser who has the problem; it is the Group! The U3A Groups Coordinator can give advice and information is available on the St Albans U3A Web site under Publications 'When Problems Occur'; however this advice is summarised below.

A Group can often self-heal if the Organiser calls a meeting and confronts the Group with the issues and holds a discussion.

### **Potential Problems:**

**a) The Group or members' expectations are too high**

The U3A provides a learning environment where each individual is encouraged to contribute as much or as little as they are able at a given time. If everyone feels comfortable enough to contribute, then it is a good learning environment. They also learn who listen quietly.

### **b) People don't turn up**

Refer to Groups Organisation Guidance(Section 6c of this booklet).

Review what was agreed when the Group was originally set-up.

Review the non-attendance policy. If you haven't got one, the Organiser should get the members to agree one now. Thereafter the member is notified of the policy and removed from the list.

### **c) Numbers are dropping off**

Review the Groups' activities. Has it all got a bit monotonous?

Consider some new activities; e.g. a trip, a lunch, a speaker. Consider the need for a breathing space and then start up again, perhaps with a new Organiser.

Could the Group expand its scope?

Advise the Groups Coordinator to advertise the Group as 'Actively Recruiting'.

Attend 'Getting to know you' events to recruit new members

### **d) The Group has got too big**

Review the policy on target viable numbers. If there wasn't one make it now.

Close membership immediately and start a waiting list.

Be guided by what is in the best interests of the whole U3A membership. Consider how all the people with this interest can join a Group as soon as possible.

One obvious solution could be to split it into two (or more). A new Organiser will be needed for the new Group(s).

Another is to close it down for a couple of months and then start up a similar one. Members must re-register. A waiting list is started immediately the agreed ceiling is reached and a new Group formed from the waiting list. New Groups can start up with new guidelines.

### **e) One member dominates or is disruptive**

Strong chairing is needed to regulate stronger personalities, especially in Groups where discussions take place.

The Organiser should keep members on topic until the main business of the meeting is over.

If the Group engages in discussion, a policy on rotating the chair may be appropriate. The Organiser may need to remind members of the duties of the chairperson?

The Organiser could have private word with the member in question.

### **f) Personality Clashes**

The Organiser could speak to individuals separately and together and ask them what they see as the way forward.

### **g) Only a few people are prepared to host the meetings**

Perhaps people have insufficient room and can be 'excused'. If only one or two people have sufficient room, perhaps a few people could arrive early and help 'set up' i.e. move chairs and tables. Everyone should help clear away. Refreshments could also be provided by those who are not able to host the meeting.

Alternatively you could consider hiring a room/hall? A list of venues is available on the website under the Publications tab.

The Groups Coordinator is available to give advice.

As a last resort serious matters would be referred to the Executive Committee.

### **h) A member does not fit in**

This is a delicate area. Members must take individual responsibility for joining Groups that they can manage, e.g. walking pace and distance, using public transport, time commitment, and promptness.

## **14. Non Members**

If somebody wants to try a couple of U3A activities prior to deciding whether to join, this is allowable under our insurance cover, providing somebody is monitoring the situation and keeps the group leader informed, to ensure any attendance by a non-member does not

continue indefinitely. Non-members may only attend two events before joining, be they meetings, group activities or trips.

A non-member e.g. spouse or friend of a member, may attend an interest group, general meeting or outing, on an occasional basis. This includes outings on a coach.

It is not, however, acceptable for the same non-member to regularly attend U3A events.

The insurance cover provided for you is for U3A members and therefore, should a non member be allowed to attend U3A activities on a regular basis and be involved in an incident, the U3A might find itself without liability cover.

U3A members may attend a group twice as a guest before deciding whether or not they wish to join it permanently.

U3A members who belong to a walking group may take grandchildren and/or dogs with them; the insurance is in place to provide cover. This does not, however, extend to other U3A activities.

## **15. Members with Disabilities**

Group Organisers should take reasonable steps to ensure that people with disabilities can attend their Groups, without needing a companion/carer with them. It is nonetheless important that members take full responsibility for their own participation in activities/events. TheU3A is not a social care organisation so while Group Organisers and other Group members should support members with disabilities, they must avoid playing the role of a carer. Members who cannot manage

to participate in their chosen U3A activities without help should be given the opportunity to bring a companion/carer with them who, for the time that they are in attendance, will be covered by the liability insurance provided by TAT. The only exception to this is a professionally employed carer who would have to be covered by an individual liability policy

## **16. Discussion Groups**

Information on successfully running Discussion Groups can be found on the St Albans U3A web site, under the Publications tab.

## **17. Sustaining Your Group**

Information on making your Group vibrant and successful can be found on the St Albans U3A web site, under the Publications tab. The Groups Coordinator can also give advice.

## **18. Insurance**

TAT provides legal liability insurance on behalf of members. The most common way in which liability to another person can arise is in the case of *negligence*.

Insurance is not the same as personal accident insurance. In the case of an accident where there is no legal liability, the TAT insurance does not come into play.

Members of more active Groups should be asked to sign an understanding to show that they appreciate the above situation and that they participate at their own risk.



Organisers have a duty of care and need to assess potential hazards e.g. researching walks and having a back-marker.

Advice on insurance and status of visitors is available from the web site.

## 19. Accidents

After an accident, a full report must be entered on the accident form available from the St Albans U3A web site under Publications.

This must be sent to the U3A secretary within three days to conform to insurance regulations.

## 20. Finance

The U3A is a charity and bound by the Charity Commission rules, which are legally enforceable. The U3A Treasurer can advise.

Paid tutors **must** have Public Liability Insurance; the U3A does not have Employer's Liability Insurance.

Each Group is self-financing but when a Group is turning over amounts in excess of £100, transactions should be made via the U3A Hon. Treasurer. Cheques should be payable to "St Albans U3A" with a brief note on the back stating which group it applies to and for what purpose.

Requests for payment should be made on the relevant Expenditure Requisition form on the web site under publications. Sundry costs such as photocopying etc. should be distributed among members.

If a group accumulates a surplus over time, the members can decide to use the money to purchase supplies, reduce what the members pay for the venue, buy a gift for the organiser/ tutor, or simply request a refund for the members of the group.

Group organisers must ensure their group covers its outgoings, e.g. if venue charges increase, members must contribute more.

## **21. Useful information**

### **a) Help**

The TAT website has a wealth of information including guidance on a number of Group activities <https://www.u3a.org.uk/>

### **b) Venue Hire**

A list of venues is available on the website.

Please let the U3A Groups Coordinator know if you can recommend any venues not on this list.

### **c) Travel**

Groups who organise outings and trips for their members should refer to the Social Events and Travel TAT Guide on <https://www.u3a.org.uk/>

[www.journeyplanner.org](http://www.journeyplanner.org) is Transport for London's route planner.

Routes can be planned selecting individually chosen forms of transport. It provides useful information about buses; the stop 'letter' and a map of the stop location.

[www.nationalrail.co.uk/](http://www.nationalrail.co.uk/) is the best site for booking rail travel in advance.

#### **d) Using Computers/Tablets and Smart Phones / Reduced-price computer software**

Computer software at educational prices (considerable discount) is available to U3A members at: [www.software4students.co.uk](http://www.software4students.co.uk)

When ordering fill in The University of the Third Age BR1 1QE as the educational establishment.

#### **e) IT courses**

Computer Friendly [www.cfsta.org](http://www.cfsta.org) runs courses for all abilities and covers a variety of topics at very affordable rates.

Help is also available for Group Organisers in setting up Group emails and developing their IT skills.

#### **f) Photocopying**

When photocopying any material for group activities, it is the organiser's responsibility to ensure that copyright is not breached.

## **g) Third Age Trust Resource Centre**

**Free resources** are available **from** The Resource Centre:

[www.u3a.org.uk](http://www.u3a.org.uk) This is the national TAT site. It has a wealth of information and resources that can be downloaded for free.

The TAT site has information on shared learning projects and summer schools.

TAT Subject Organisers are specialists who offer a subject advisory service through telephone or email.

## **h) Other Sources**

- The Open University
- Central Library St Albans
- The Internet

## **i) Virtual U3A**

The on-line U3A might be of interest to members confined to home.

[www.vu3a.org](http://www.vu3a.org)