Hurst, Hassocks and Ditchling u3a:
Advice for Group Leaders

1 Role of Group Leader

- Group Leaders are volunteers responsible for organising the meetings of their interest group, managing its membership, and communicating with its members and potential members, usually by email. An interest group may have more than one Group Leader, sharing responsibilities for their group.
- Groups and their leaders determine their own activities with a wide measure of autonomy, subject to the general purposes and ethos of the u3a. Group leaders are the main point of contact between groups and the Groups Coordinator, who is normally a member of the HHD executive committee.
- Group Leaders are expected to take reasonable steps to identify and mitigate risks associated with group activities and to this end to maintain emergency contact details for group members.
- There are annual opportunities for Group Leaders to meet each other to discuss matters of mutual interest, and to showcase their group's activities at an "Open Morning".
- The HHD u3a Groups Coordinator is available for help and advice on managing interest groups, and establishing new groups.
- Further guidance on the topics covered by this document can be found in the HHD u3a's *Policy Guides*.

2 Safeguarding personal information

Group Leaders maintain the contact details of group members, either locally on their own computers, or, preferably, centrally on the u3a Beacon System (see Section 3, below).

Personal information must be collected, stored and managed in line with data protection principles. Email communications with group members should therefore be made using blind copies (Bcc), unless a group has agreed that email addresses may be shown (for example, in the case where group members wish to share information with others in the group). Emails sent using Beacon are automatically sent as blind copies.

3 The Beacon System

Beacon is an online management system designed by u3as, for u3as. It provides a simple interface for managing members, groups and finances.

Group Leaders are encouraged to seek training on the system, and then use it to

- manage information about their interest group (see Section 4 below),
- manage group membership and contact details (see Section 5 below),
- send emails to group members.

4 Information about your interest group on the HHD u3a website

The Groups Page on the HHD u3a website gives basic information about each interest group, including a brief description of the group's activities, meeting times, meeting venue, and the

group's status: 'Active' (open to new members), 'Waiting list' (not currently open to new members) or 'Dormant' (temporarily inactive).

Although you can change times of meeting or information about your group on Beacon, there is no automatic data transfer to the HHD u3a website. You should therefore provide updated information to the Groups Coordinator, copied to the website team, who will make the changes to the website on your behalf.

On each Group's page, a 'Group email' link is provided in blue text; anyone can send an email to the group leader by clicking on this link. This is the usual method by which people ask to join an interest group.

5 Membership of interest groups

You can list current members of your interest group on Beacon, add new members and delete members who leave. Contact the Groups Coordinator if you require assistance.

When new members join the group, you should check their membership cards, or on the Beacon system, to confirm that they are current members of the HHD u3a. People are entitled to attend twice without joining u3a but they must then join to continue attending. In April, please remind people to renew their membership and then check membership cards or Beacon in May.

People who are paid-up members of Burgess Hill (BH) and Haywards Heath (HH) u3as can join our groups, so long as their home u3a does not offer the same group, with space available. In this instance, they do not need to join HHD u3a as we have a reciprocal agreement, but please verify their membership. If there is a waiting list to join the group, HHD members should be given priority. Should the group become full however, BH and HH members should not be asked to leave the group.

If you have a Group that needs more members you can advertise the vacancies internally by contacting the Groups Coordinator, website team, Facebook team and/or the newsletter editor. If, following this, there are still vacancies, you may advertise within the other two u3as, provided that the other u3as do not have an equivalent group of their own.

6 Interest group meetings

Where possible, interest group meetings take place in members' homes. If your membership is too large for a private home or the activity warrants space, you can ask the Treasurer to book and pay for an external venue for you. The Groups Coordinator will have a list of approved venues. You will need to give the Treasurer the dates and times you require, and you will need to collect money from group members to reimburse the Treasurer for the cost of the venue. Groups are expected to cover their own costs, but not to accrue a significant surplus. This means working out a cost per member which may need to be adjusted from time to time.

Groups may apply to the Executive Committee for small grants to purchase necessary equipment or otherwise support the development of their group. Any items purchased in this way remain the property of HHD u3a. Group leaders who wish to make an application should discuss it with the Groups Coordinator in the first instance.

It is useful to keep a note of attendance at meetings, for which the *Group Attendance Register* template may be used. Group leaders of walking, cycling or other outside groups should always make a note of who is participating each time to make sure that no one is lost along the way. If

there is a waiting list to join a group and some existing members have very rarely attended, it is reasonable to ask them make way for others to join.

7 Risk assessments

Our u3a has a duty of care towards its members and has to ensure that reasonable care has been taken to avoid risks. You should therefore complete a risk assessment covering the activities of your interest group from time to time, even if risk mitigations, such as awareness of trip hazards, may seem obvious. Some checklists for carrying out risk assessments of your group's activities are available on our website. Further risk assessment templates and advice on how and when to use them can be found in the Members Area of the u3a National website (> Members Area > Resources and Information > Useful Documents > Risk Assessments).

Group Leaders should also be mindful of the mobility issues of any of their members and whenever possible make arrangements that are inclusive of all members. They should advise group members of access arrangements for meetings, pointing out any difficulties that a particular location may have, such as access steps or an upstairs bathroom.

8 In case of emergency

You should ask group members to give you the name and number of a person to be contacted in case of emergency. This is especially important for groups which meet outside. From time-to-time, and at least annually, you should check that the contact details provided remain valid. You should encourage group members to have an 'In Case of Emergency' (ICE) number on their phones.

9 Accidents and incidents

Please report any incidents or accidents requiring assistance that occur during group activities to the Groups Coordinator, as this provides a record for our information and for your support and protection.

10 Insurance

Members are covered by u3a insurance for most activities but this does not cover members' journeys to meetings and activities, or car sharing.

Richard Ware

HHD u3a Groups Coordinator

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