

Being a Group Leader: Advice and Checklist

First of all, thank you for being a Group Leader in u3a in Kennet. Our Groups are the centre of our activities and could not operate without volunteers like you. Most Group Leaders find their role rewarding, enjoyable and fun – although at times a little frustrating. But, there is lots of support for Group Leaders – just ask if you want some help.

The main thing is to welcome new members and to support them in getting the most from your group.

Here are eight things that you should do: use these as a tool if you are a new Group Leader or as a reminder if otherwise.

Group Leader Responsibilities in Brief

1. Keep a register of attendance at your group. This will be needed later.
2. Welcome newcomers to your Group but check that they are eligible to join.
3. Communicate regularly with your group and to the rest of the u3a.
4. Understand and keep compliant with the General Data Protection Regulation (GDPR).
5. Look after any money or equipment involved in running your group in the right way.
6. Think about safety and accessibility when running your group by having a risk assessment record when appropriate especially whilst Covid-19 rules and regulations apply.
7. Always look for extra help and support in your role from Executive Committee members or other group leaders.
8. Understand and embody the Principles of the u3a Movement.

These tasks in more detail:	Contacts	Timing
1. Keep a register of attendance at your group		
1.1 At the beginning of each year you will receive a Blank Register for your group in the form of a spreadsheet containing a list of previously notified members and a blank expenditure summary at the end. Feel free to adapt this to meet any specific requirements of your Group.	Groups Coordinator	August / September
1.2 When new members join (see 2.) add them to the register and inform the Group Coordinator. If a member leaves your Group, please indicate this on the register and inform the Group Coordinator.	Groups Coordinator	As required
1.3 If you have been set up to use the BEACON membership system you can add new members (or remove them) directly on Beacon. <i>[For more information on BEACON, contact the Beacon Coordinator]</i>	Beacon Coordinator	As required

These tasks in more detail:		Contacts	Timing
1.4	At the end of each year, send a completed copy of your register to the Groups Coordinator	Groups Coordinator	At the end of July
2. Welcome newcomers to your Group but ensure they are eligible to join			
2.1	Confirm newcomers are members of u3a in Kennet	Membership Secretary or BEACON	As required
2.2	Members of u3a in Pewsey and u3a in Devizes are eligible to join one Group in u3a in Kennet. Check eligibility with our Membership Secretary. <i>[They will added to BEACON as "Associate Members" to enable groups using BEACON to email all their members]</i>	Membership Secretary	As required
2.3	Follow up members who have not come for several meetings	Group members	
2.4	At the beginning of each year you will receive a list of members who have not renewed their membership. Encourage them to re-join. If they are unwilling to do so they should be removed from your register and are not eligible to attend Group sessions.		August/ September
3. Communicate regularly with your group and to the rest of the U3A			
3.1	Check that the description of your group shown on the website is correct. If changes are needed please send them to the Groups Coordinator	Groups Coordinator	At formation of your group and following any changes
3.2	Ensure all members of your group have regular communications from you by email, face-to-face or by phone.	Group Members	
3.3	Provide information and articles for the Website, Newsletter and Yearbook	Newsletter Editor Website Editor	As required
4. Understand and keep compliant with the General Data Protection Regulation (GDPR)			
4.1	The u3a in Kennet holds personal data of its members to manage membership and communicate with members. Details are in the u3a in Kennet Data Protection and Privacy Policies .	Executive Committee	
4.2	Personal information (including telephone numbers and email addresses) of a member must not be shared with other members without explicit permission from the member. <i>[The use of Beacon or .bcc in emails prevents members seeing each other's email address]</i>		

These tasks in more detail:	Contacts	Timing
4.3 Any device (Computer, tablet etc) holding personal information of group members should be protected with a password		
4.4 Make use of the u3a in kennet email address set up for each Group Leader. This can be accessed directly or emails may be automatically sent to your personal email address. Personal email addresses are not published in u3a in Kennet publications. For help on u3a in Kennet emails please contact website@u3a in kennet.org.uk	Website Editor	
4.5 If you, as a Group Leader do not use email, you should confirm whether you are willing for your phone number to appear in the Yearbook and website	Groups Coordinator and Webmaster	
5. Look after any money or equipment involved in running your group in the right way		
5.1 Many groups have no equipment and no costs associated with running the group (e.g. those meeting in members' homes).	n.a.	
5.2 Any money collected for group activities is the property of u3a in Kennet and must be accounted for. Any payments for room hire or trips should be paid from the u3a in Kennet bank account. Group Leaders should liaise with the Hon Treasurer.	Hon Treasurer	
5.3 A small payment (typically 30p per attendee) may be made to the host to cover the cost of tea/coffee and this does not need to be accounted for.		
5.4 Guidance is available to help Group Leaders budget for recurring costs (e.g. venue hire) to enable an appropriate charge to be calculated for each member.	Hon Treasurer	
5.5 Accurate records of payments made by members should be maintained and reported at the end of the year (July) to the Groups Coordinator and Hon Treasurer with the completed registers	Groups Coordinator Hon Treasurer	July
6. Think about safety and accessibility when running your group		
6.1 Groups holding meetings in external venues should review the Venue Risk Assessment Checklist on the national website: u3a.org.uk		

These tasks in more detail:	Contacts	Timing
6.2 Walking Groups should review the Walk Leader Risk Assessment Checklist on the national website: u3a.org.uk . and also take account of other guidance (e.g. Highway Code). Other outdoor groups (e.g. Cycling, Flora & Fauna, etc) should apply the recommendations in context.		
6.3 The u3a has liability insurance which covers all u3a Groups. Details can be found on the national website: u3a.org.uk		
6.4 Complete an Accident Report Form asap for any injuries sustained during a u3a Activity and send it to the Groups Coordinator straight away.	Groups Coordinator	
7. Always look for extra help and support in your role.		
7.1 It is helpful to identify a deputy who can run your group when you are away. <i>[Note: Deputies can also be set up on Beacon – see 1.3]</i>		
7.2 Getting more people involved In running your group helps to share the work and develop new Group Leaders for the future.		
8. Understand and embody the Principles of the u3a Movement		
8.1 Be familiar with the Principles of the u3a Movement		u3a.org.uk/about/vision

Other Information	
Beacon Coordinator	Membershipsec@u3ainkennet.org.uk
Groups Coordinator	groups@u3ainkennet.org.uk
Hon Treasurer	treasurer@u3ainkennet.org.uk
More detailed advice	u3ainkennet.org.uk/group-leaders/

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