Guidance Notes for Group Leaders

This document aims to lay out all the practical information you need as a Group Leader.

1 General

(a) The Group Leader (GL) is the point of contact for members of their Interest Group and is the link between the Groups Coordinator who is, in turn, the link to the Hu3a Committee.

(b) The Groups Coordinator will offer you information and support and should be your first point of contact on any issues.

(c) Group Leaders are responsible for organising activities, maintaining attendance and financial records – these roles can be shared with other group members. It always helps to share some responsibilities, especially with larger groups and it helps to sustain the group.

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(d) Group Leaders are encouraged to use Beacon, the u3a management tool which makes it quick and easy to contact group members. It also enables you to ensure group members are fully paid-up members of Hu3a.

Make sure Beacon is kept up to date by adding members when they join the group and removing them when they leave.

(e) New members should receive a welcome letter/email introducing them to the group with all relevant information such as costs, meeting times, access to the venue and car parking availability.

(f) Non-members are allowed to attend an interest group for two taster sessions after which they must become members of Hu3a.

(g) In the event of an accident or an Hu3a member being taken seriously ill, regardless of whether you have a member present with a current First Aid qualification, you are advised to contact the emergency services immediately.

(h) Should an accident occur, please complete an Accident Report Form and send a copy to the Groups Coordinator as soon as you can.

(i) On outings, walks or other events which take groups away from their static meeting place, leaders should have emergency contact details of those taking part and be aware of any medical conditions that might affect the members taking part. Ideally you should complete a Risk Assessment form before the activity.

(j) Group Leaders should inform the Groups Coordinator of any changes to the leadership, membership or meeting arrangements for the group. If moving from a domestic venue to a hired venue, please talk to the Treasurer for advice regarding payment.

(k) Consider letting other Hu3a members know about your group's activities by writing a short article with photographs for the monthly newsletter, Upstream, and for the national u3a magazine u3a Matters. Our website is also a good place to add an overview of your group, photographs can appeal too.

(l) u3a Matters contains a list of subject advisers for many interest areas. You may want to contact them for advice on running your group.

2 Insurance

(a) Group members are covered by u3a insurance during any u3a activity, including activities held in a member's house. It includes:

- accidental damage to equipment or venue;
- accidental damage to members' possessions;
- extra expenses caused by illness or personal accident whilst at a u3a event e.g. transport;
- Public Liability, in case a member of the public is injured during u3a activity.

(b) Carers are covered if they are required to remain with the member during a session. However, they are not part of the interest group unless they are a u3a member themselves.

(c) In the case of an accident which results in personal injury or damage to property, group leaders should send a detailed report to the Committee, including details of any witnesses.

3 Waiting Lists

(a) Waiting lists are not encouraged.

(b) If numbers attending a group become too large for the venue, the options are either to move to a larger venue or to start a second group.

(c) It is very important that new members joining Hu3a can join an interest group of their choice as soon as possible.

(d) Should you be unable to accept new members please inform the Groups Coordinator.

4 Group Finances

(a) Interest groups are expected to be self-funding and can collect and pay such sums of money as the group members and leadership deem to be necessary to undertake their activities. Group Leaders may pay sums due by use of personal debit or credit cards or issuing their own cheque or paying online through their own bank account.

(b) For newly formed Groups, the Group Leader is authorised to spend up to £100 for the purchase of items of equipment necessary to enable that Group to start its activities, and to claim this as expenses in the normal way. The amount claimed must be repaid to Hu3a once the Group's finances have stabilised, and at the latest within 1 year of start-up. This facility is also available to any established Group that has sudden and unexpected expense.

If items of equipment costing more than £100 are required to ensure a Group's continued operation, an application for funding can be made to the Committee. If successful, that equipment becomes the property of Hu3a and can be borrowed by other Groups as appropriate, and there will be no requirement for the Group to repay that expense.

(c) Group Leaders should **never** open a bank account or apply for a grant linked to their interest group.

(d) The Group Leader should agree with members the level of subscription necessary to support the group's activities. If funds should exceed the normal running costs of one or a maximum of two sessions, it is suggested that the group should be offered a free session.

(e) It is important that clear records are kept and submitted to the Treasurer in the group's six-monthly report.

In this report, Group Leaders must provide the Treasurer with the following information, in order that accurate accounts can be maintained and presented to the Committee and ultimately to members at the AGM, so as to maintain transparency and trust for all concerned:

- amounts received as subscriptions;
- amounts paid as venue rental, if appropriate;
- payments made – itemised as refreshments, equipment etc;
- any other expenditure.
- amount retained as a float.

Two options are available for keeping records:

(i) Using the Beacon Group Ledger, an easy to use money in/money out and balance system that the Treasurer can view (this is the preferred option and training can be given);
(ii) Producing a typed/handwritten account or spreadsheet of the account, on a six-monthly report submitted to the Treasurer.

As a safeguard, the group leader must agree with the Treasurer a maximum amount to be retained as a float, £100 is recommended, but it is recognised that some groups may occasionally need to temporarily exceed this figure. Any surplus should be handed to the Treasurer for payment into the Hu3a 1 account and will be ring- fenced for the group's future activities.

(f) Note that if funds held by Group Leaders in their own home are lost, they must be replaced by that Group Leader.

(g) If a group can no longer continue, funds held by that group must be passed to the Treasurer and be held until either the group can restart or is dissolved. The funds will then be transferred to the main Hu3a account.

(h) Under no circumstances should any money held by the group to be given to another charity.

(i) The u3a is a non-profit making organisation, however, interest groups can fund-raise for Hu3a eg performances etc. Any fund-raising activity should be notified to the Committee and any funds raised passed directly to the Treasurer and should not be held by the group.

5 Venues

(a) Most groups meet in private homes or hired public venues. Group leaders will need to make participants aware of the facilities available - such as emergency exit procedures.

(b) All rental agreements for public venues should be signed by the Treasurer. Payment can be made by the Group Leader paying the venue hire direct, or passing payment to the Treasurer.

6 Paid Tutors

(a) The u3a learning model is based on u3a members contributing to their interest group and paid tutors do not fall within the ethos of the u3a learning model.

(b) A non-u3a speaker may be used as a one-off contribution to an interest group, but regular speakers at interest groups would not be following the u3a model.

(c) If a tutor is regularly used it is important to ensure that they are self-employed. The reason for this is to ensure that the HMRC does not see the person as essentially employed by the u3a which would mean that National Insurance and pension requirements and employment rights would need to be considered.

(d) Agreement to use a paid tutor needs to be formally approved by the Hu3a Committee.

Approved by Groups Coordinator 20April 2026 Signed: Brian Perrett, Chair

Revised 24 July 2026

Next Review Date: October 2026