

Leigh Estuary U3A



Group Contact/Leaders Information

Thank you for stepping forward as a Group Contact/Leader. We appreciate your contribution to our U3A. The position carries some responsibilities but it should also be immensely rewarding. We hope this pack of information and advice will help you to enjoy the role.

Groups Coordinator Sally Dickinson

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GROUP CONTACT/LEADERS – Guidelines

Here are a few guidelines to safeguard you and your members: -

- Try not to take the whole load on your shoulders. Get other group members to help with admin, finance and activities.
- Advise the Groups Co-ordinator if your group has vacancies or becomes full. If your group is full, please keep a waiting list and advise the Groups Co-ordinator once this reaches 4-6 names, so he/she can try to get another group started.
- Always use blind-copy (Bcc) on all group emails. Data Protection rules require that you do not share personal data, including contact details without permission.
- It must be discussed with the Groups Co-ordinator if you are planning to use a paid expert on a temporary basis.
- Regularly review your membership. If you have members who have been inactive for some time, please contact them to see if they want to remain in the group. If they do not, you could offer a place to the next person on the waiting list.
- Encourage group members to fill in their 'In Case of Emergency' (ICE) details on the back of their membership card and to carry it with them at all times.
- Be aware that a member is entitled to attend a group meeting once to see if he/she is interested in joining having contacted you first.
- Be aware of the limitations of your group members. You should not have to restrict events to accommodate individuals but you should always warn them of potential hazards (e.g. steep stairs etc.).

You must:

- Operate within Government guidelines for Covid-19 – further details can be also be found on the Trust's website - <https://www.u3a.org.uk/covid-19-advice-on-u3a-activities>
- Operate within the **Financial Guidelines** set out in this pack.
- Operate within common sense guidelines regarding health & safety. If there is an accident in your group, you must complete the Accident Form attached to this pack and ensure it is recorded in the 'accident book' at the venue (if any). Please pass the form onto any committee member. Use your common sense in regard to calling an ambulance, or just taking a moment's rest. The health and safety of members is the priority.
- Keep **attendance registers** for each meeting/event, including those in private homes, and hold them for three years.
- Check that your attendees are indeed members of Leigh Estuary U3A. Please ask to see membership cards for new members at their first meeting and for all members once a year after the annual renewal.
- Ask your members to provide you with the following details: telephone number, mobile number, email address, plus an emergency contact name and

phone number. **It would be advisable to carry this information with you at group meetings and on trips.**

- Familiarise yourself and group members with your regular venue especially with respect to fire exits and any emergency procedures.

Leigh Estuary U3A Communications

Please keep your group webpage up to date by informing the webmaster (dwhiteu3a@gmail.com) of any change in arrangements/group status etc. Photos and write-ups about your group are always welcome and make your group page interesting for all members.

Inform the Groups Coordinator of any items you would like mentioned in the Group News emailed monthly with the Newsflash such as group spaces, group trips, change of venue etc. and at the monthly meetings. Please inform the Groups Coordinator by the end of each month.

Financial Guidelines

Many groups meet in a hired venue, such as Leigh Community Centre (LCC). It is the Group Contact/Leader's responsibility to book and pay for the venue and, if the need arises, to cancel it. (LCC refund the charge if you cancel with a week's clear notice). In order to calculate your meeting charge where there is a hire fee, divide the cost by the number of members in your group attending each meeting. Whatever total figure you arrive at is best rounded up to the nearest 50p. A group may have to book and pay for a meeting venue for a fixed period. In these circumstances, it is necessary to collect payments in advance from group members, to fund the booking. If a group closes, any funds held at the time of closure should be passed to the Treasurer.

Some groups collect substantial amounts of money to fund future events, e.g. Days out by Coach and Theatre. Such groups should pass all monies to the Treasurer who will pay relevant bills and expenses relating to the event.

You are advised not to allow U3A money in your possession to exceed around £50.

Our accounts have to be inspected after the end of each financial year and we do need information, including details of any funds held at that time. Each Group Contact/Leader must report to the Treasurer, the amount of funds in their possession as at 31st March each year.

Group Contact/Leaders must keep adequate financial records to enable reports to be given to all or any group members or the Treasurer if requested to do so.

The Treasurer is more than happy to advise any Group Contact/Leader with queries about financial arrangements. The Treasurer can be contacted via our website.

Following recent guidelines from Central Office all Group Contact/Leaders who collect moneys from group members and use those funds to pay group expenses, e.g. venue hire or pre-book an activity or outing/trip must as soon as possible after 31 March each year make a summary report to the Treasurer of funds b/fwd at the 1 April, funds collected in the year and funds expended during the year and balance held at 31 March. If you need guidance on this matter please refer to the Treasurer.

Notes on Trips, Outings & Pre-paid Events

U3A has strict rules to govern any financial liabilities of its branches, Group Contact/Leaders and members. Some of the recommendations below have been

developed to protect you from financial embarrassment. They are intended to ensure that members' money is kept safe. These notes have been prepared to help guide Group Contact/Leaders through the process where a service provider (i.e. a coach company) needs to be paid in advance of an event. You should discuss your proposal with the Treasurer before you make any financial arrangements or commitments.

These guidelines do not apply to trips/events where members simply pay on the day (e.g. a trip to London using public transport).

General Principles

- Interest groups must be self-financing. You should divide any costs incurred equally between your members (including yourself) and levy a charge which would comfortably cover all expenses. Group Contacts must not be out of pocket. (Be aware that cancellation charges may be greater than your initial deposit).
- In no circumstances should you enter into any financial commitment unless you have collected funds first.
- Group Contact/Leaders should ensure that service providers are appropriately bonded & insured.
- Use a well-known, well established local coach company.
- Coach companies often run trips to specific events and you can therefore, simply book seats on a scheduled coach rather than organise this yourself.
- Similarly, coach companies will often agree to undertake organising a trip including travel and tickets.
- If you cannot get enough support for your trips from within your group you can invite members from within Leigh Estuary U3A. Family and friends are not permitted to attend events and group visits, they must be LEU3A members. U3A members are covered by U3A organised insurance.
- Please note that U3A insurance for planned events only covers third party liability. It does NOT cover personal accident, injury or personal possessions; members wanting cover in these areas have to make their own insurance arrangements.
- The purchase of tickets online should be discussed with the Treasurer in advance.
- When a member who has pre-paid for an event cancels the arrangement, no refund will be given unless the organiser can recoup all or at least part of the cost. In such cases:
 - The Group Contact/Leader should inform the Treasurer and then an appropriate refund may be made. Any queries should be addressed to the Treasurer.
 - Please ensure that members are aware of the following:

When we run a trip or any other event requiring pre-payment every care is taken in our choice of providers. In the extremely unlikely event of a provider failing to deliver, any resultant unrecoverable loss cannot be borne by our U3A. Members need to be aware that ultimately the risk has to lie with them, as would have been the case if they had booked the event privately.
- Where an event requires no upfront payment all members who book for such an event but do not cancel in good time or just do not turn up must be aware that they are liable for all and any costs incurred relating to their non-attendance and Group Contact/Leaders must request payment from such

individuals. In the event of difficulties Group Contact/Leaders should discuss the situation with the Treasurer.

Event Planning

- Third party deposits/charges must generally be paid using a cheque from Leigh Estuary U3A. The Treasurer will write a cheque only when a Group Contact/Leader (or trip organiser) has handed over cash/cheques that cover that amount, so please allow time to enable this process to happen.
- When planning an event (including a coach trip), try to gauge the level of interest. Talk to one of the local coach companies & see what they can offer and what payment terms they require, particularly cancellation liabilities.
- Use a provisional booking until you are sure that you have enough places sold to make the trip viable.
- Do detailed calculations, ensuring that you include all charges, as well as gratuities. When you are hiring a coach you are advised to set your price on the assumption that you will not manage to fill it; using a figure of 70% is more realistic. If you then end up in surplus you can always return monies on the day. Remember, it is easier to give money back, but not so easy to have to charge more. Submit an Event Proposal Form to the Treasurer, so that your calculations can be checked.
- To secure a place at an event a member must make payment in full. Taking deposits and then further payments would only create more work for you, and could leave the viability of the trip in doubt.
- Make sure that if members do pay a deposit, they know the cut-off date for refunds in the event of cancellation on their part.
- Make sure that members understand trip details e.g. itinerary, duration, pick-up points and what's included in the price.

The following forms are available on the Links & Downloads (Group Documents) page of our website

- Accident Form
- Event Proposal Form
- Group Registers
- Venue Checklist
- Walk Leader Checklist

And finally

The Third Age Trust has an excellent website: www.u3a.org.uk

It is easy to register for the members' area in which you have access to additional information on leading a group. National Subject Advisors and lots of online ideas, advice, support and resources.