



TAW U3A Guidance for Group Leaders

1. Purpose

This Guidance is intended to provide Group Leaders with the information they need to ensure the Groups are set up and then run both in accordance with the requirements of the Constitution and in line with practices recommended/required by the Charities' Trustees.

If you have any queries or concerns, having read this guidance, please speak to the Groups Co-ordinator or the Chairman.

2. Setting up a Group

First contact the Groups Co-ordinator who will help and support you in setting up the new Group. An Initial funding of up to a £100.00, to help with start-up costs, is available from the Treasurer.

After contacting the Groups Co-ordinator, place an advert in the Newsletter, by providing a short write up about the group, along with the group details, and passing it onto the Newsletter editor.

3. Beacon

Beacon is an on-line tool available to group Leaders. Details of your group are created in Beacon along with all the relevant details. Once the group is set up, you can add or remove members within your group using the main membership list. This enables you to have a record of your group's membership and their details. For details of how to obtain a Beacon account, please contact the Beacon Administrator.

4. Insurance

Insurance against Public Liability, amongst other risks has been arranged through the Third Age Trust and a copy can be found on the TAW U3A Website.



5. Contracts

Do Not Commit TAW U3A to any expenditure without first obtaining the authority of the Trustees.

This requirement includes (But is not limited to)

1. The signing contracts for any venue to hold a Group Activity
2. The signing contracts for transport for a Group Activity
3. The signing of contracts for a third party help (e.g. Speakers or Instructors) for a Group Activity.
4. The purchase of materials or equipment for use by a Group or for TAW U3A generally.
5. The hiring of storage facilities for Group Assets.

It is the Trustees responsibility to make sure that all Taw U3A's funds are used only for the purposes of the Charity

6. Group held in outside accommodation

If you are responsible for selecting a suitable venue, make sure you consult the venues risk assessment and any Accessibility requirements of your members. Don't sign any rental agreement yourself, pass it to the Group Leader Co-ordinator for the TRUSTEES to deal with.

When you arrive at the venue/day, make sure you are familiar with the Fire Regulations and explain to your members.

If your activity takes place in a workshop/outbuilding consult the risk assessment checklist for a workshop activity. A copy can be found on the Taw U3A Website.

7. Your members

Ask your members to provide you with contact details i.e. telephone numbers/email addresses and emergency contact numbers. These can also be found on Beacon. A software utility tool that is available to Group Leaders.

Ensure everybody attending is a member and at the start of the Taw U3A year ask them to produce to you their membership card. Keep a note that

you have carried out this check. Always check when any new members arrive and keep a Register of Attendance in case of an Insurance Claim “NO MEMBERSHIP CARD NO INSURANCE”

Members may attend any Group once to see if it is suitable. After that they must decide whether to join or not as the case may be. This also applies to Affiliated Members.

If a member stops coming, try to find out why, if they do not attend for 5 months they should be removed from your list and the place offered to another member.

8. Problems

In the case of an accident complete an accident-Incident form, available on TAW U3A Website or send a detailed report to the Group Leader Co-ordinator, including details of witnesses.

If emergency first aid is required consult with the casualty on whether they are happy with any treatment or phone for help. You may need to contact the Members Emergency Number.

Remember personal accident insurance cover is **not** provided by the Third Age Trust. If damage is caused to property by a member of the group, take full details, as it may in future be the subject of an insurance claim.

Should you have a difficult member whose behaviour is regularly impacting on other members of the group go to the Group Leader Co-ordinator for help.

If you have a serious problem in a session, it is quite acceptable to ask a member to leave but contact the Group Leader Co-ordinator as soon as possible after the end of the session.

If you have a member who cannot cope independently, inform the Group Leader Co-ordinator.



8. Self-financing groups

Never open a bank account in the name of U3A. If you put members' money into your personal account, you must be able to account for it.

Always give receipts and avoid cash where possible. Get receipts where possible when you hand money over. If you are using your own credit card to pay for group events, consult the Treasurer for advice.

Report as regularly to the treasurer as you are required to do so; you will be required to provide your end account on the standard U3A form. These can be obtained from the Treasurer.

9. Group organisation

Make sure you give sufficient information for group members to make an informed choice as to whether they wish to participate and then let them decide. This is particularly important if you are running a physical activity. Remind members if you are doing a physically active subject that they undertake it at their own risk.

If you are leading walks, have a look at the walk leader checklist. (Available on the [Taw U3A Website](#)). Taw U3A pay for a license which covers photocopying, recorded music, DVDs/Videos and performance.

If you provide written material and use the U3A logo, make sure it is correctly displayed. Check with the Taw U3A Webmaster. Delegate where you can and spread the load.

10. Coffee Mornings

Coffee mornings occur on the first Monday each month unless that Monday is a Bank Holiday, in which case the Morning will be rearranged if possible.

Coffee Mornings are held at Roundswell Community Hall, next to Sainsbury's. Each Coffee Morning is hosted by one or two Groups liaising with each other.

It is the responsibility of the Leader of the Group hosting a Morning.

1. To arrange for the collection of the Resource Bag from the Group which hosted the previous month's Morning.
2. To purchase Milk only (4pt = 60 people)
3. To ensure that sufficient members of the Group attend the Morning to serve coffee and to clear the site afterwards.
4. To make a presentation to the Morning explaining the activities and purpose of your Group and to undertake a Quiz of approx. 20 questions.
5. To pass the Resource Bag to the leader of the Group which is to host the following month's Morning.
6. To arrange for members of the Group to sit at the door to the Hall and to collect £1 from everyone attending a Coffee Morning except those who are able to produce a Coffee Morning Complimentary Slip.
7. To issue a Raffle ticket. Raffle tickets to be put in container ready for the Draw.

The receipts from the Coffee Morning are used as follows

1. To cover the cost of the milk
2. To pay for the hire of the Hall
3. Any money not needed by the Group must be given to the Treasurer.

Please make sure that members are aware that parking permits should be obtained at the door if any member is likely to use Sainsbury's carpark for more than three hours, including any time spent shopping before or after attending the Morning.

10. Group Leaders Meeting

A meeting of all of the Group Leaders is held at least once a year, usually in February. At the meeting, Group Leaders have the chance to raise any issues regarding their own or any other Group and about Taw U3A as a whole. It is the Group Leader's responsibility to make sure that their Group is represented at that meeting.



11. Other publications which might be useful

On the Taw U3A Website you will find many forms, policies and guidelines that might be helpful to yourself.

<https://taw.u3asite.uk/>

Trustees and Group Co-ordinator details can also be found in the Monthly Newsletter

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