



CRAWLEY  
Registered Charity No 1029004

**Crawley u3a  
Group Leaders'  
HANDBOOK**

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# PART ONE

## Introduction

### 1. Purpose

To provide advice, guidance, and support to Group Leaders.

### 2. Scope

The title 'Group Leader' is used throughout this document, however it also means to include any members of Crawley u3a who help to run an interest group, whether you are a Group Leader or Point of Contact; may help run a group with one or two others, or you may be the group's Treasurer to manage the monies. This handbook is relevant to all of you.

### 3. Interest groups

Thank you for running an interest group. We are sure you find it very rewarding, but sometimes it might seem a bit daunting as new forms are introduced, policies change, or there is a change within your group. This handbook is intended to provide some practical guidance and support.

It is often said that interest groups are the life blood of the u3a, and each group will develop its own structure. However, it is important that your group follows the u3a ethos of shared, participative, and self-help learning. The result will not only be an increase in knowledge, but a supportive and friendly atmosphere which enables everyone to participate.

### 4. Contact Information

Within this Guide there are a variety of topics that persons, from within the Committee and within our membership, have contributed. Contact information for each Trustee or Support person can be found in [Appendix 1](#) at the end of this document.

### 5. u3a principles

The u3a ethos is based on three principles:

#### The Third Age Principle:

- Membership of a u3a is open to all in their third age.
- Members promote the values of lifelong learning and the positive attributes of belonging to a u3a.
- Members should do all they can to ensure that people wanting to join a u3a can do so.

**The Self-Help Learning principle:**

- Members form interest groups covering as wide a range of topics and activities as they desire.
- Learning is by the members, for the members.
- No qualifications are sought or offered. Learning is for its own sake, with enjoyment being the prime motive, not qualifications or awards.
- There is no distinction between the learners and the teachers. They are all u3a members.

**The Mutual Aid principle:**

- Each u3a is a mutual aid organisation, operationally independent but a member of the Third Age Trust, which requires adherence to the u3a movement.
- No payments are made to members for services to any u3a.
- Each u3a is self-funded with membership subscriptions kept as low as possible.
- Outside financial assistance should only be sought if it does not imperil the integrity of the u3a.

## PART TWO

### Crawley u3a Group Classification

The first version of the Groups Classification within the Finance section to the new Group Leaders' handbook was launched at the Group Leaders meeting on the 2 October 2023.

Following that, the Treasurer and Groups Coordinator reviewed that version and felt that it needed to be expanded to provide more clarity on both why Groups have been allocated into the different categories within the Group Classification ([Appendix 2](#)); and how the new fee setting, and cost management arrangement apply to the different categories. Please refer to [The Financial Aspects of running a Group](#) section of this Handbook for further information.

CLASSIFICATION OF GROUPS				
<b>Home Based and Ad hoc</b>	<b>Room Based</b>		<b>Outings, Physical Activity and Special Interest</b>	<b>Fixed Duration Groups</b>
	<b>St Paul's based</b>	<b>Other Venues</b>		

#### Home Based Groups and Ad Hoc Groups

Home Based Group as a definition is quite self-explanatory. These are groups that meet in a member's home and will be run by either a Group Leader or a Point of Contact as an administrator for the group.

Ad Hoc Groups are a flexible type of group that runs on an 'as and when' arrangement that is suggested by the group members. Ad Hoc groups within this category will principally use WhatsApp as a method to communicate any arrangements between the group members.

#### Room based group at St Paul's

Groups that meet at St Paul's and are principally topic-based groups are colloquially known as the 'pooled' groups as they have a shared fee structure.

It is important to note this as there are also groups who meet at St Paul's, but they fall into the Outdoor, Sporting, and Special Interest groups category.

See the Classification Group table previously referred to at the beginning of this page.

#### Room based group at Other Venues

Groups that meet at a venue other than St Paul's, and there are a variety of groups that do this, set their fees according to the room hire costs applicable for their venue and numbers of members they may attract. All groups within this category are encouraged to be self-financing, i.e. that the group covers the cost of the hire of their venue and any additional expenditure they may incur. The fees required from members will vary from group to group.

### **Outdoor, Sporting, and Special Interest Groups**

Similar to those groups that meet at a variety of venues, groups that fall into this category cover a wide range of activities, and although some may meet at St Paul's, due to their expenditure for equipment, trainer, and additional costs that can only be used for the particular group, they will set their session fees accordingly.

For Groups in this category, guidance from the Third Age Trust is specific and clear that any costs incurred in the employment of an external trainer or provider must be paid for by the Group that is benefiting from that service.

Crawley u3a equally applies the same approach to any specialist facilities (e.g., Tennis courts, Air Rifle range) or equipment (e.g., Table Tennis tables, Short Mat bowls equipment) that is regularly used by a particular group and cannot be used by any other Groups in delivering their normal activities. Any costs associated with these 'specialities' are to be paid for by the Group benefiting from their use.

In addition, within this category the Out & About, Walking, and Theatre groups are included, and these groups have a different fee setting arrangement. These groups apply an annual subscription fee to members of the group, and that is set by each individual group depending on their needs. Monies in surplus for these groups are carried forward year on year so if little is spent on administration or other costs, some of these groups may choose to waive collecting any fees for a forthcoming year.

### **Fixed Term Groups**

This category of groups has a different approach to fees. As the group is by its' nature of short-term duration, taster sessions (i.e. a first session free of charge) do not apply. Members joining one of these groups will need to pay full session fees on joining.

## PART THREE

### The Financial Aspects of Running a Group

#### **Extract of Financial Section for Groups from Financial Policy**

For administration and accounting purposes Activity Groups are classified into one of the following categories:

#### **Home Based**

This covers all Groups that hold a regular meeting at the home of one of the group members. These groups are normally limited to a maximum group size of eight members.

#### **Ad Hoc**

These groups meet on an 'as and when' basis, with all costs being borne by each member attending.

#### **Room Based**

This covers the traditional "classroom" groups that meet at a fixed location on a regular basis. This can cover both traditional educational subjects, (e.g., History, Poetry) and social gatherings activities such as painting, musical activities, cards, and board games.

#### **Outdoor, Sporting, and Special Interest**

This covers all other groups; including all outdoor activities, trips & outings, and sports (both indoor and outdoor) where there is a need for specialist facilities, accommodation, or equipment. A listing of the current groups and their classification can be found on [Appendix 2](#).

#### **Fixed Term**

This will likely cover "classroom" groups that meet at a fixed location on a regular basis, but are short-term and no taster sessions are available to members.

### **1. General Principles**

- 1.1 This section should be read in conjunction with Crawley u3a's Financial Policy and the associated Delegated decision schedule which sets out the overall financial framework within which the u3a affairs are conducted. Copies are available on the Crawley u3a website.
- 1.2 For administration purposes Crawley u3a operate on a termly basis, that broadly matches the academic year. It breaks the year into three terms for both reporting and financial management purposes. The year is split as follows:
  - Autumn Term (September, October, November, and December)
  - Spring Term (January, February, March, and April)
  - Summer Term (May, June, July, August)

Note: The schedule ignores, on a practical basis, when Easter falls as this moves from year to year. Groups generally do not meet in August.

- 1.3 The u3a's general financial principles are that each activity group should be self-financing and that no group should be disadvantaged due to low membership and/or attendance numbers.
- 1.4 To ensure the health and sustainability of the u3a, it is important that it offers the widest range of activities it can. Therefore, to ensure that smaller groups can function, in certain circumstances, venue hire costs and other running costs are pooled together and funded by applying a standard attendance fee to all members attending the meetings of those groups.
- 1.5 To assist with the smooth running of the u3a, Group Leaders will be expected to use a set of standard forms for reporting and accounting for all income received and payment of all expenses. See Form section 5 below.
- 1.6 The Crawley u3a Financial Year runs from 1st September to 31st August.
- 1.7 The Treasurer will monitor individual Group's income and expenditure and will highlight potential issues to both the relevant Group Leader and Committee. It should not be necessary for a Group to close because expenses are not being covered by fees; the Committee will however keep under review any group where expenses are significantly exceeding income.
- 1.8 Members' cheques for all u3a activities should be made payable to Crawley u3a.
- 1.9 Receipts collected from any activity should be paid in full into the u3a bank account, no expenditure should be netted off against the receipts.

## 2. Fees

- 1.1 The level of group activity fees is determined on an annual basis by the relevant Group Leaders in consultation with the Treasurer.
- 1.2 For those groups, in what is colloquially known as the St Paul's 'pooled' Room based groups, a Fee Setting Meeting is arranged on an annual basis, just prior to the start of each new financial year. The Group Leaders who represent these groups, with the advice and recommendation of the Treasurer, will determine the level of fees required for the forthcoming year.
- 1.3 Where fees are collectable Group Leaders will determine the frequency that the fees are collected for their group.  
As a guide:
  - Groups meeting weekly – fees collected on attendance.
  - All other Room based groups should, where possible, collect the fees on a termly basis at the start of each term. This is for ease of administration especially for groups that meet monthly or fortnightly.
  - Outdoor, Sporting and Special Interest groups that charge an annual membership fee can arrange with the Treasurer for their fees to be collected annually by invoice to group members, at the start of each Membership year. Otherwise, the Group Leader should collect any attendance fee on a "weekly" or "termly" basis.

- 2.3. The Group Leader will agree with the Treasurer the method of collection and payment of the money into the u3a's bank account. This is to ensure that all transactions go through the accounts and to ensure transparency, the avoidance of any uncertainty, and to meet audit requirements.
- 2.4. For current procedures and rules on 'refunds' or 'deferral of termly fees' where members are unable to attend a meeting, they have already paid for can be found in [Section 7](#).
- 2.5. When setting the Group Fees, the Fees will need to recover all the expected costs that will be incurred by that group within that year. This will also include an allowance for any major items of equipment that may need to be acquired or replaced in a future year.
- 2.6. The fees for each category are determined as follows:

#### **Home Based**

As these groups are by nature small and do not consume any external accommodation costs, no fees are applied. It will be up to each Group to determine and agree how the costs of running their group are shared amongst themselves.

#### **Ad Hoc**

These groups meet on an 'as and when' basis. They operate with each member paying their own cost. Their costs do not form part of the u3a accounts and therefore do not need to comply with this guidance.

#### **Room Based**

A standard attendance fee is applied to these groups. These are determined by the relevant Group Leader(s) in consultation with the Treasurer.

The money collected will be accounted for to the Treasurer using Account Form O1 (for weekly groups) or Account Form O2 (for termly groups).

#### **Fixed Term**

The Fee is set at the beginning of the group's activities and is set to fully recover all costs that are anticipated to be incurred.

#### **Outings, Physical activity, and Special Interest**

The costs for these groups will vary according to what the group is doing. The Group Leader, in consultation with the Treasurer, will determine the fee for their group on an annual basis prior to the beginning of each Membership year.

Where a group uses a combination of outdoor and room-based activities, the fee charged should, as a minimum, be equivalent to the Room Based Attendance Fee.

These should be accounted for to the Treasurer using Account Form O1 or O2.

Any money collected for trips, outings or events undertaken by a group should be accounted for to the Treasurer using Account Form O3.

### 3. Attendance

- 3.1. For both insurance and Health & Safety reasons, it is important that a record of who has attended a Group meeting or event is taken.
- 3.2. As a minimum the following guidance should be followed.

#### **Home Based Group & Ad Hoc**

The Group Leader should collect and maintain a record of which members have attended each meeting of the group, including their Name and Membership number. This information should be made available to the Committee when requested.

#### **Room based & Fixed Term groups meeting weekly (both St Paul's and Other Venues)**

The attendance should be recorded along with the fees collected on Account Form O1.

#### **Room based & Fixed Term groups meeting other than weekly (both St Paul's and Other Venues)**

The attendance should be recorded on Account Form O2A and sent to the Treasurer following completion of that term's activities.

#### **Outdoor, Sporting, and Special Interest Groups**

The Group Leader should collect and maintain a record of which members have attended each meeting of the group, including their Name and Membership number. This information should be made available to the Committee when requested.

#### **Trips and Outings**

It will be assumed that the attendance at the event/activity will be equivalent to the Membership that have paid for it and recorded on the Account Form O3. Should the actual attendance differ on the day of the event, then the Treasurer should be informed by email after the event, especially if the non-attendance will result in a refund being made to those Members.

### 4. Expenses

- 4.1 Expenditure incurred by Activity Groups has been separated into three classifications, dependant on the way the expenditure is funded. The classifications and their funding streams are:

#### **Accommodation costs**

These are the costs incurred in hiring venues or facilities.

#### **Group running expenses and consumables**

These are costs incurred in both managing the group and delivering the activity. These are funded from the Fees set for each Activity group. A schedule of the costs that come under this heading is set out in [Appendix 3](#). Where a cost does not appear on the Appen the Group Leader should discuss this with the Treasurer before incurring any costs.

## Equipment

Equipment valued under £100 is classified as consumables, but any item costing more than £20.00 needs to be approved by the Treasurer before it is purchased.

All large items of furniture or equipment valued over £100 require the approval of the Committee before being purchased.

These purchases can be funded in two ways:

1. From within a Group's own resources, via their accumulated surpluses
2. By the Committee from general reserves

When a Group knows that it will require to purchase a major item at some point in the future, then it should look to accumulate surpluses to fund that item. This is achieved by adding a contribution into its Group's fee calculations.

- 4.2. Group Leaders can incur and then claim back running expenses and consumables, using Account Form O4. Whenever possible receipts should be obtained for all purchases and sent to the Treasurer with the claim form for audit purposes.
- 4.3. For items of general administration such as photocopying or printing pre-set reimbursement rates have been set by the Committee and are set out on Account Form O4.
- 4.4. As an alternative to incurring the costs and then claiming them back, Group Leaders can obtain an invoice from the supplier and then use Account Form O5 to request the Treasurer to make a payment direct to the supplier.

## 5. Surpluses and Deficits (Application for use of the Restricted Fund)

- 5.1. Estimating what income you are going to need and what expenses you are going to incur in advance is not a precise science. Group Leaders will not get it spot on. At the end of a year there will be potential surpluses or deficits which will need to be addressed in future fee setting exercises.
- 5.2. Under the principle of 'self-financing', any surpluses or deficits generated by an Activity group will remain with that group, unless the group is part of a cost sharing arrangement (i.e., St Paul's 'pooled' Room-Based groups) where individual surpluses and deficits will be combined into a single figure.
- 5.3. Any surpluses will remain with the Group for them to use in future years to purchase new and replace old equipment, or off-set future year's fee requirements.
- 5.4. If a deficit is incurred then the Group Leader will need to recoup that loss through increasing the group's Fee for future years. To spread the impact, Group Leaders can plan to recover the deficit over a period of up to three years, though smaller deficits should be looked at being recovered over a single year.

- 5.5. Where the deficit has been caused by a significant unforeseen event and is of a level which would place the group in an unsustainable financial position, the Group Leader can request financial support via the Treasurer from the ue3a's Restricted Fund.
- 5.6. Requesting financial support from the u3a's Restricted Fund will require the Group to meet certain criteria and will need to qualify under a 'Fee Review' in consultation with the Treasurer and Groups Coordinator. Further information on this is set out in [Appendix 4](#).

## 6. Forms

The following information references all Accounts Forms; their description, and when they are to be used. The forms can be found on the [Crawley u3a website – Group Leaders – Forms – Account Forms](#) at: <https://u3asites.org.uk/crawley/page/127441>

Excel versions of these forms are available from the Treasurer, but Group Leaders can devise their own bespoke electronic form, as long as it contains all the information/data required. Any bespoke form will need to be agreed with the Treasurer before being used.

- 6.1. To aid the quick and efficient processing of financial transactions, a set of standard forms have been established. These forms are explained below.
- 6.2. The Folio and Acct number boxes on the forms are for the Treasurer's use only.
- 6.3. The Membership number is required for compliance with general insurance requirements.

### **Accounts Form 01 – Attendance and Receipts form – Weekly groups (A&R Form)**

This is a multipurpose form, for use by groups meeting either weekly or fortnightly, it records/reports both activity fees received and attendance.

The forms can be populated with the members names and membership numbers in a variety of ways.

- Group Leaders can download the data directly from Beacon and copy/paste it into the form.
- Group Leaders can populate it directly.
- Group Leaders can ask the Treasurer to provide an already populated version, in an appropriate computer format that they can access.

Data will be downloaded directly from Beacon, so Group Leaders should ensure that their group's membership records on Beacon are kept up to date.

It is important that regular returns and payments are made to the Treasurer. Groups meeting weekly or fortnightly, should submit at least one return per calendar month.

### **Accounts Form 02 – Termly Attendance Fees Receipt Form**

This is for groups meeting monthly or fortnightly. It should be used to record attendance fees collected. It should be completed and returned to the Treasurer as soon as 'termly' fees have been collected.

Fees from Members who for some reason pay late, or new members who join the group mid-term can be submitted on a separate form, when those payments have been collected.

Termly fees are determined by multiplying the 'standard attendance fee' by the number of times the group will meet that term. The forms can be populated with the members names and membership numbers in a variety of ways.

- Group Leaders can download the data directly from Beacon and copy/paste it into the form.
- Group Leaders can populate it directly.
- Group Leaders can ask the Treasurer to provide an already populated version, in an appropriate computer format that they can access.

Data will be downloaded directly from Beacon, so Group Leaders should ensure that membership records for their group are kept up to date.

### **Accounts Form 02A – Attendance form – Monthly groups (A&R Form)**

This is for use by groups meeting monthly or fortnightly. It only records attendance. Fees are reported using Account Form 02. The forms can be populated in a similar way to Account Form 02.

It is important that attendance data is recorded and returned to the Treasurer. Groups should submit at least one completed form per term.

### **Accounts Form 03 – Events Receipt Form**

This is for reporting fees collected for 'one-off' trips or events. For trips where the number exceeds thirty, then multiple forms can be put together to form one return.

### **Accounts Form 04 – Claim for Expenses Form**

This is for claiming back the running and consumable expenses incurred by the group.

Documentary evidence or receipts should be attached to evidence that the expenses have been incurred.

### **Accounts Form 05 – Request for Payment Form**

Used to obtain direct payment to a supplier or third party. An associated invoice must be attached to evidence the expenditure has been or will be incurred.

## 7. Financial Policy

In addition to the above information, there is a full Financial Policy that gives further guidance and information. This **Financial Policy** can be found on the Crawley u3a website – Group Leaders – Policies & Procedures:

<https://u3asites.org.uk/files/c/crawley/docs/financialpolicy-may2023.pdf>

The Financial Policy is accompanied by a separate Financial Policy – Delegated decision schedule which sets out more detail some of the financial procedures that should be complied with. Some of the key ones are set out below.

## 8. Deferment Rules

- 8.1 Group Leaders can determine when a deferment of fees already paid for the current term can be transferred into the following term. This would normally follow a request from a member.
- 8.2 It can be applied if one or more meetings have been missed for any of the following reasons:
  - Illness (especially if of an infectious nature, such as Covid) or hospitalisation.
  - Bereavement.
  - Caring for a close family member due to illness or bereavement.
  - Attending a funeral.
- 8.3 Where a member is unable to physically get to a session, due to either bad weather or lack of transportation making it impossible for them to attend.
- 8.4 An automatic deferment should be applied if the Venue cancels the session for whatever reason.
- 8.5 Deferral should not normally be permitted:
  - When members miss meetings due to holidays or clashes with private social events.
  - Where a member wishes to participate in two different activities that are scheduled to take place at the same time.
- 8.6 In these circumstances the two Group Leaders and the Member can agree the appropriate level of fees to be charged for each Group at the beginning of each term.

## 9. Group Fees for Group Leaders

- 9.1 Group attendance and Outdoor membership fees are waived for up to three Group Leaders [inc. those who help to run a group] per activity/group, and this includes day trips. But in all cases, as the Group Leader is responsible for setting and collecting fees, it is up to them to ensure they have taken the cost of the 'free' place(s) into their calculations.
- 9.2 No waiver is applied to Study Trips or Holidays.

- 9.3 It was agreed that trips involving nights away, which are judged to be holidays rather than study trips, should not be treated as falling within Crawley u3a's activities as they did not align with Crawley u3a's charity objects.
- 9.4 Hence deposits for such trips should not in future go through Crawley u3a's bank account or financial accounts and members would need to pay the organiser or holiday operator directly.
- 9.5 The following definitions were adopted:
- A Holiday will be defined as a trip involving merely travel to a destination, staying at least one night at that destination, and then travelling back to Crawley with no compulsory programme of activities.
  - A Study Trip would be the same as a holiday but would include some compulsory structured programme of activities or visits, designed to impart learning.

The default position is that holidays, being outside the charitable objects, are not u3a activities and should not therefore use any u3a branding, resources or bank account but that if any u3a branding, resources or bank accounts are used then the holiday will be seen as a Crawley u3a activity and the organiser be expected to follow our standard policies and procedures for any overnight activity, including the submission of a budget and risk assessment beforehand.

## **10. Carers**

If the attendance of a Carer does not increase the costs to the u3a then Carers will be able to attend Activity Groups free of charge. If a Member wants a Carer to go with them on a paid trip or outing, then the Member will have to pay the same level of contribution for the Carer as any other Member would towards the costs of the trip or outing.

## PART FOUR

### Administration - Running a Group

#### 1. Beacon

We should firstly mention that Beacon is the administrative computer system that the Third Age Trust and Crawley u3a use to retain records of our members, their contact information, and, particularly relevant for yourself, the activity Groups that exist within Crawley u3a.

- 1.1 Group Leaders, wherever possible, are expected to manage their Group, which includes keeping an up-to-date record of which members belong to your group. Beacon can be used to send emails to your group members, obtain information for your Attendance Sheets and Accounts Forms, and, when necessary, offer the option to print a current [Emergency Contact](#) list if you are running a day trip. Note that any printed lists should be kept confidential, secure, and disposed of carefully when no longer needed.
- 1.2 If you are a new Group Leader or administrator for your group, you will have a Beacon account created, be given a log in and password, and given training on the use of the system for your role. If you are an experienced group leader, but would like some refresher training on Beacon, please contact our Beacon Administrator.
- 1.3 Beacon help guides are available on the Beacon admin site once you have logged in. Simplifying some of the main tasks, a Help Guide is also being created for Crawley u3a that will be available via our website. Link to be added once completed.

#### 2. Attendance Registers & Fees

- 2.1 Group Leaders should take a register of the Members attending each individual fee-paying meeting. For those members who join each outing, walk, or other type of excursion, keep a separate record.
- 2.2 Keeping a record of which members attend each session helps Crawley u3a ensure that there is compliance with Health & Safety and Insurance requirements, and the Treasurer has an accurate record of attendances and fees due (where applicable).
- 2.3 The Group Leader will need to collect session fees. Please refer to the [Financial Aspects of Running a Group](#) section of this document for more information. Completed Attendance Forms are used to reconcile group members on your Form with those members who are registered on Beacon as a member of your group.
- 2.4 Group Leaders should keep up-to-date records of their Group members on the Beacon system. If you have any difficulties in doing this, please advise the Groups Coordinator team. Training or refresher training can be arranged. It is recognised that some Group Leaders are not in a position to manage Beacon for their group, and in those circumstances, a nominated person will manage Beacon for you. You need to ensure this is arranged with the Groups Coordinator.

### 3. Room Bookings & Cancellations

- 3.1 The venue for a Group meeting at St Paul's is normally booked by the Assistant Groups Coordinator. For Guidance on using St Paul's see [Appendix 5](#).
- 3.2 For bookings at other Venues, the Group Leader will normally have direct contact with the Venue Administrator to arrange their bookings. If you don't have access to this and need to make a booking, please notify the Assistant Groups Coordinator and Treasurer.
- 3.3 When requesting a booking, ensure that you have allowed adequate time before and after the meeting if 'set-up' time is required for your session. This will have been agreed beforehand with the Groups Coordinator when your group was formed. If anything has changed and you need to adjust your booking times, in the first instance you should discuss your new requirements with the Assistant Groups Coordinator. Please note that additional fees may be incurred if the length of booking is extended.
- 3.4 Group Leaders should ensure that all groups' meetings are populated into the event calendar of Beacon. If your room booking has been made through the Assistant Groups Coordinator, Beacon will be updated for you. If you use a Venue other than St Paul's, if required, you can request that the Assistant Groups Coordinator populates your session dates and times into Beacon. Make sure you let the Assistant Groups Coordinator know the details.
- 3.5 If your session dates & times vary, and you would like them to be included on your Group Web Page, please contact the Communications Coordinator. Note: The calendar of your Group's sessions is used to confirm the booking with the venue and the associated payment to them for the room hire.
- 3.6 If a meeting must be cancelled or rescheduled, the Group Leader should inform group members as soon as possible. In addition, the venue booking must be cancelled or rescheduled.
- 3.7 If the Venue is St Paul's, please notify the Assistant Groups Coordinator as soon as possible to ensure the room is cancelled. St Paul's venue cancellations incur no cost if a session is cancelled over 7 days before the meeting. If the session is cancelled less than 7 days before the meeting, full cost of the room hire is invoiced.
- 3.8 For Venues outside of St Paul's, as the Group Leader please ensure you inform your Venue administrator of any cancellations or reschedule of sessions, and please notify the Assistant Groups Coordinator too. The Assistant Groups Coordinator will ensure that Beacon is updated. Please note the Treasurer uses Beacon to check for sessions that occurred when Invoices are sent through from each Venue.

## 4. Home Based Groups

- 4.1 Where a Group meets in a member's home, the Group Leader will schedule the session arrangements. Please notify the Assistant Groups Coordinator of your session dates and times. Even though there are no room fees to check, Beacon is still populated with this information.
- 4.2 Please note that some u3a insurance cover is available to protect members' possessions but that the member whose home is used needs to conduct a risk assessment in advance of the meeting. The Insurance Guidance document is on the [Crawley u3a website – Group Leaders – Policies & Procedures – Insurance Guidance \(section 3 \(g\)\)](https://u3asites.org.uk/crawley/page/132428): <https://u3asites.org.uk/crawley/page/132428>

## 5. Emergency Contact Information

- 5.1 Registers are also required in case of any emergency. A Member completes a confidential emergency contact name and number when they complete their Annual Membership Renewal Form, and this information is stored on the Beacon system.
- 5.2 Group Leaders, and those members temporarily acting as a Group Leader where the Group Leader is not present on a walk, outing, or other group activity, may download this information for the members attending the event.  
*NB: A Help Guide is being created for Crawley u3a that will be available via our website. Link to be added once completed.*
- 5.3 Emergency Contact information is restrictive and should not be shared without the prior written permission of the individual, as this may contravene data protection legislation, and nor will it be retained for longer than is necessary.

## 6. Taster Sessions

A revised policy on taster sessions has been created to make it more transparent, and the guidance for non-members wishing to try out Crawley u3a has also been revised. In essence, as has been the position, our members may attend almost all existing groups with the first session free of charge and we have made it clear that, for these groups, there will be no restriction on the number of groups a member may try out free the first time. Please note, however, that there are exceptions to groups offering a free 'first' session and therefore the full Policy should be read: [Appendix 6](#).

## 7. Non-attendance of members

If a member of your group is absent for three consecutive sessions without informing you, consider:

- have tried to contact the member to see if they wish to continue in the group
- have had no response to any attempts to contact them
- there is no valid reason you know of for their non-attendance

If all the above are negative, consider whether you need to remove the member from the group. This is especially valid if you are running a Waiting List and have active members who wish to join your group.

## 8. Full Groups and Waiting Lists

- 8.1 The number of members in a group may have to be limited for various reasons, e.g., the nature of the activity, health and safety, room capacity, etc.,
- 8.2 If your activity group is full, and you have members wishing to join your group that cannot be offered a place, please contact the Groups Coordinator to discuss the situation. Can you think of anything that can be done to resolve this?
- 8.3 Please don't just tell a member that your group is full. We appreciate that may be the fact, and a member does need to be advised this, but can this message be tempered? For example, does your Group run a Waiting List? The member could then join your group later if a place becomes available. Beacon offers the facility to create a Waiting List.

For more information see [General Information on running a Group – Waiting Lists](#)

## 9. Guest Members

- 9.1 A Guest member is defined as someone who is already registered as a member of another u3a, but who wishes to join a Crawley u3a activity group.
- 9.2 Group Leaders will have the dispensation to determine whether they would like to open up their group to members from other u3a's.
- 9.3 Where the Group Leader has determined that there is a vacancy in the group and there is no waiting list for members of Crawley u3a (Full or Associate), a Guest member may be offered that activity group.
- 9.4 The Group Leader will need to check the Guest Member's credentials as a member of the u3a movement by asking to see the membership card/proof of membership from the Guest Member's primary u3a.
- 9.5 If the Guest member has not already completed a Guest Membership Form for Crawley u3a, then this form should be given to the member.

There are no membership fees involved with completion of this Form. Its purpose is so that the Membership team can register the member on Beacon. You will then be able to add the person to your Group, and communicate with them, in the same way you do for your other members.

*Should a Guest Member wish to attend the Crawley u3a programme of monthly meetings, general membership events, or go on seasonal outing, then they will need to become an Associate Member of Crawley u3a.*

- 9.6 Ensure that the Guest Member's name and their Crawley u3a Guest membership number are recorded on both the Income and the Attendance forms. These may be added to any current forms you are using. Collect the relevant Attendance fee. A Guest Member will pay the standard attendance fee. See [Taster Sessions](#) for information on Guest Members.

- 9.7 Please note that if Beacon is used as the primary source of communication, once the member has completed their Guest Membership form, and this has been processed, you will be able to add the member to your group on Beacon.

Note: Any emails sent outside of Beacon should either be sent individually to a member, or if an email is sent to multiple members at the same time, ensure you use BCC as the field to enter the member’s email address. Using this field results in no-one else being able to see a member’s email address, thus keeping data confidential.

- 9.8 For ease of recording the Guest’s details on forms temporarily whilst the Guest Membership Form is being processed, please use the following notation as a prefix to the number to identify the relevant u3a the member belongs.

H – Horsham	D – Dorking & district	E – Elmbridge
EG – East Grinstead	RR – Reigate & Redhill	EE – Epsom & Ewell
HW – Haywards Heath	TW – Tunbridge Wells	
HR – Horley	BH – Brighton & Hove	

- 9.9 If the Member is not from a u3a on the list, then please make a note on the form which u3a the Guest Member belongs and their membership number. The Treasurer will note this u3a and add that u3a to the list.
- 9.10 All Members of any u3a are automatically covered by the general Third Age Trust insurance policies to take part in any u3a activity wherever undertaken.

## 10. Equipment

- 10.1 Crawley u3a maintains a list of shared equipment for use at Group meetings. This list is available on the Crawley u3a website. A copy can be obtained on request from the Treasurer.
- 10.2 Some equipment may be group specific. The Group Leader is responsible for ensuring that the equipment is safely used, maintained, and stored in a secure place. Any breakages or loss of equipment should be reported immediately to the Treasurer.

## 11. Death Notifications

We now have a revised process agreed with the Members Coordinator team.

- 11.1 Any death notifications for an active member of Crawley u3a will now be advised to the Assistant Groups Coordinator (AGC) so that a check can be made to see if the member belongs to any group, and if so to then the AGC will notify all relevant group leaders. This notification won’t come from the Members Coordinator team

– when they learn of a death, they will advise the AGC as part of the relevant parties needing to be informed.

- 11.2 We would ask that if you learn of a member's death, but have not been advised by the AGC, please send a notification to the AGC. It will then be the responsibility of the AGC to ensure that all the relevant parties are notified – such as the Members Coordinator team, other Group Leaders, Welfare, and the Communications Coordinator.

## **12. Removal of Members from your Groups on Beacon**

- 12.1 As part of the revised process, it has been agreed that only a Group Leader or, if the Group Leader does not manage Beacon that the Assistant Groups Coordinator or the Groups Coordinator on their behalf, will remove a member from the Group. No-one else should do this.
- 12.2 However, it is also important that at Renewal stage, you do keep an eye on your Group Record – anyone appearing in red will mean that the renewal hasn't yet been processed or, importantly, even received.

## PART FIVE

### First Steps to Forming a New Group

The Committee are always keen to hear from anyone who has an idea for a new group, or starting a second group to a popular group already running. It is understood that you may already be committed, but if you know of anyone who is keen to pitch an idea, do tell them to contact the Groups Coordinator.

All activities within the u3a do not have to take the form of being a formal, permanent and regular group, or a one-off "event". Obviously, some review processes have to be carried out for groups requiring hired premises and incurring other costs, but groups with no fixed costs which meet on a regular or ad-hoc basis can be set up quickly and easily with just an advertisement in the newsletter. The same is true of one-off events with no fixed costs.

- 1.1 New groups can be created in a number of ways:
  - A potential Group Leader securing sufficient interest in a subject.
  - A list of interested members without a nominated Group Leader.
  - The splitting of an activity group that has become too large.
  - A person with subject interest skills and knowledge who is keen to join up with others to enjoy the topic.

Before the group can be established, there are some recommended steps that need to be taken. These are straightforward.

- 1.2 In the first instance, contact the Groups Coordinator to discuss the proposal. During this stage, we will ask some questions to find out how fully formed the idea of the group may be. See [Appendix 7](#).
- 1.3 If the Group has a financial implication, the Groups Coordinator will submit the idea to the Treasurer to discuss. However, if there are no financial implications, the Groups Coordinator will discuss advertising the idea of the group in the monthly newsletter immediately.
- 1.4 If there are costs involved, then on initial approval from the Treasurer, your group will be promoted using different methods. This could include developing publicity in the form of a flyer, poster, promotion via existing groups, via our u3a newsletter, using our social media site, sharing at a monthly meeting, and talking to members in groups that you attend. The more methods you use, the more successful you are likely to be.
- 1.5 Individual Group Leaders should ensure that the content and information about their activity group is appropriate and correct before it is published, either on the website or in hard copy documents. This information will be discussed with the Groups Coordinator prior to publishing and details should include the venue, day, time, and dates, plus an outline of the intended programme of activity. This ensures that members making enquiries are adequately informed.

## First Group Meeting

You may be taking over from an existing Group Leader or starting a new group, and this may be your first time running a group. Some recommended steps to take at your first meeting:

- Introduce yourself and the purpose of the group as you see it.
- Consider gathering the support of group members to agree the tasks that need doing to run the group – ask if anyone is willing to support these, for example, is anyone willing to help with developing the programme or keep the register, or act as Group Treasurer.
- Ask about the skills and experience within the group. If relevant, do your members have the requisite skill level that the group will be aimed at – beginners, improvers, advanced. Can you adapt the content if there are variances? NB: You may have been clear when the group was advertised what the skill level should be, but it is worth checking.
- With the members, confirm how the group will work – discussion, instruction, presentation etc.
- With the members, discuss and confirm the frequency, times, and days the Group will run.
- Identify any accessibility needs that group members may have.  
The **EDI Policy** is available on the [Crawley u3a website – Group Leaders – Policies & Procedures: https://u3asites.org.uk/crawley/page/132428](https://u3asites.org.uk/crawley/page/132428)
- Confirm the fees for attending the group, when they should be paid, and if there are any incidental other expenses.
- Discuss how group members will communicate with each other bearing in mind data protection guidance (e.g. always using the BCC function if you use a personal email system, or use Beacon, to avoid sharing addresses between all members) and always seek permission and agreement if telephone numbers are shared, a WhatsApp group is set up, or photographs are taken to be published of group members.
- Agree some ground rules e.g.
  - Be punctual
  - Listen to each other
  - Allow others to speak
  - Let the Group Leader (or another person) know if you are unable to attend a meeting.
  - Agree to disagree amicably and be respectful to other group members
  - Every contribution matters
  - Have patience with and encourage those who are slower to learn

After your first meeting it is a good idea to feedback to your Groups Coordinator: what was agreed, are there any issues/concerns you have, and how you felt the session went.

## PART SIX

### General Information on running a Group

#### 1. Promoting your Group

- 1.1 Promoting activities is key to generating new members and retaining existing ones. Group Leaders should speak with the Groups Coordinator if they feel that their group would benefit from extra publicity.
- 1.2 Where applications for membership of individual Groups exceeds the Group Leader's expectation, the Groups Coordinator must be informed. This should include instances where numbers exceed the limits of an individual meeting room. The outcome of the discussion may require a change in venue or the establishment of a waiting list on the Beacon system.

#### 2. Sharing Information

- 2.1 It can be good to share information about your group which can be done in several ways:
  - On our u3a website [contact the Communications Coordinator]
  - Using the Crawley u3a Facebook group
  - In the u3a newsletter [contact the Communications Coordinator]
  - Your WhatsApp group
- 2.2 Please ensure that your members are happy for any of their images (whether this is of them, their work, or a picture they have taken and shared to your group) to be shared on a social media platform. A suggestion would be to get your members to agree to sharing their images when they first join your group. A member can then choose to absent themselves from any photos if they wish.

#### 3. Member Contributions to Sessions

The value of the u3a style of learning is that everyone can contribute and by doing so will gain a feeling of self-worth and integration. We all learn in different ways and variation in content, method and style can make the learning experience more vibrant and appealing which you can bring to your group.

Many of us will have preferred skills when learning, but most of us will use a combination of the following:

- **Visual:** using pictures, diagrams, images, and spatial understanding.
- **Verbal:** using words – both spoken and written.
- **Auditory:** using sounds, rhythm, music, spoken presentations.
- **Physical/kinaesthetic:** using hands, body, senses, and acting things out.
- **Logical/Mathematical:** using logic, systems, sequences, data, statistics.
- **Social:** learning as part of a group, sharing experiences and explaining your understanding to others.
- **Solitary:** studying on your own.

Here are some suggestions of how to make your group engaging and exciting by mixing the methods and opportunities for learning:

- **Group member presentations:** A short presentation by a member of the group or a member leading the meeting on a specific topic.
- **Discussion groups:** Some activities will lead to discussion e.g. 'What the papers say', 'Which way does water go down the plug hole – and why?'
- **Project based:** A project chosen by the members. Each person (or pair) allocated an area of research which they bring to the group. This can be a good way to learn new technology.
- **Practical work:** This might lean towards specific subjects such as science, craft, photography, creative writing, storytelling.
- **Drama:** Create a short sketch and provide some entertainment for your monthly meeting.
- **Themes:** Have an event or presentation linked to a specific topic.
- **Liaise with a school or community group:** E.g. local history presentation, art exhibition, debate.
- See [Appendix 8](#) for Additional Information.

## 4. Communicating with Group Members

- 4.1 The primary method of communicating with members within Crawley u3a is probably by email. Some Group Leaders, due to the size of their group, prefer to use Beacon as it has all the group members' email addresses in the system, and can be a quick way to create a new email to everyone in your group.
- 4.2 If you send emails, Beacon can also be the most secure method to use as it keeps members' email addresses secure and confidential and does not share emails with other group members. Information was sent to you when you were first set up on Beacon on how to use the email part of the system on Beacon, but a refresher can be given if required. And simplifying some of the main tasks, a Help Guide is also being created for Crawley u3a that will be available via our website. Link to be added once completed.
- 4.3 If you choose to send emails to your members using your own private email messaging service then any emails sent outside of Beacon should either be sent individually to a member, or if an email is sent to multiple members at the same time, ensure that you use the "BCC" field to enter the member's email addresses. Using this field results in no-one else being able to see a member's email address, thus keeping data confidential.
- 4.4 It is recognised that not all members may have email addresses so you may need to text, phone, or in some instances send information by post. In addition, some groups, particularly Ad Hoc groups, work well using WhatsApp as a communication method. All are acceptable. Please note that using WhatsApp as a communication method, does require the Group Leader to get the consent of the group member to share their phone numbers. The majority of members don't have a problem with this.

- 4.5 There is an obligation on all members to inform a Group Leader if they wish to cease participation in their activity or, if for sound reasons, e.g. health-related, they need to suspend their involvement. It is the responsibility of the Group Leader to contact any such member to clarify their involvement, consider any valid reason for non-attendance and use discretion before removing a member from their Group list.

## **5. Death Notifications**

There is a revised process agreed with the Members Coordinator team.

- 5.1 Any death notifications will be advised to the Assistant Groups Coordinator so that they can check if the member belongs to any group, and if so to then notify all relevant group leaders. This notification won't come from the Members Coordinator team – when they learn of a death, they will advise the AGC as part of the relevant parties needing to be informed.
- 5.2 We would ask that if you learn of a member's death, but have not been advised by the AGC, could you advise the AGC.
- 5.3 The AGC will then ensure that all the relevant parties are notified – such as ensure that all other Coordinator teams, any other Group Leaders, and Welfare are notified.

## **6. Removal of Members from your Groups on Beacon**

- 6.1 It has been agreed that only a Group Leader or, if the GL does not manage Beacon, then the Assistant Groups Coordinator or the Groups Coordinator on their behalf, will remove a member from the Group Record. No-one else should do this.
- 6.2 It is also important that at Renewal stage, you do keep an eye on your Group Record – anyone appearing in red will mean that the renewal hasn't yet been processed – or has been received.
- 6.3 Reports will be produced by the Membership Renewal team and passed to the Groups Coordinator team. We will then contact relevant GLs for them to investigate whether a member has overlooked the renewal of their membership, or if there is another reason for the lapse.
- 6.4 This investigation will be done before any removal of a member from a group takes place. However, it is possible that at the end of the renewal process, a member may need to be removed from a group.

## **7. Welfare**

On this topic, the Committee have recently been made aware of one or two members who, although they belonged to a number of groups, only one or two of their GLs knew of the fact that the member was suffering from an illness and hospitalisation.

This is a difficult subject as we fully respect a member's choice to keep a matter confidential, but if the member has approved other GLs knowing, it would be very helpful

if the Assistant Groups Coordinator could be advised, who will then inform the other GLs and also advise Karen Deasey (the Welfare Officer) so she can send a card.

We recognise that if a member has not attended one or two sessions of your group sessions, and you hadn't heard from them, you would have tried to contact them, but sometimes it might be difficult to do that, so if we can share information – if the member is willing – I think everyone would find that helpful.

## 8. Waiting Lists

- 8.1 Your group may have an attendance limitation and, as the Group Leader, you can decide whether to hold a waiting list for members wishing to join your group.
- 8.2 Beacon has a facility to activate Waiting lists, and once the maximum number of members is reached for your group, any further members added will show on your Group List, BUT they will show as 'Waiting to Join' and a date when they were added.
- 8.3 It is up to you, as Group Leader, whether to hold the list on Beacon, or whether to hold a list manually.
- 8.4 If you do have a Waiting List, it is beneficial to check with your current list of members regularly to establish if those members still wish to continue being a member of your group, especially if a member has not attended a meeting or been on an outing in the past 6 months.
- 8.5 There are some positives and negatives to maintaining a Waiting List on Beacon:
  - A positive is that you can clearly see who may be waiting to join your group, and the date they were added.
  - When a space becomes available, you can click on Join – and the person automatically moves from the waiting list.
  - It can also be clearly seen how many members, in addition to your group, are waiting to join.
  - Waiting lists should not get too big. If they do get too large, with the Groups Coordinator, consider asking amongst your active members, and those on the waiting list, for somebody to start a splinter group. ([see Size of a Group below](#)).
  - A negative is that, when communicating with your group on Beacon you will have to exclude those on the Waiting List from any emails you may be sending (i.e. do not select Send to All).
- 8.6 Communication
  - Keep in regular contact with those on the waiting list, at least once every three months.
  - Let them know how many others are also waiting and, if possible, where they are on the list.

- Ask them to confirm that they still wish to remain on the list.
- If you get no reply within two to three months, then you should remove them from the list (put a note about this on any email you send them). Let people know if you remove them.

#### 8.7 Offering Places to a Person on the Waiting List

- If a place becomes available in your group, the person who was added first to your Waiting List should be offered the place.
- If that person is unable to take up the offer to join your group straight away, you should advise them that they will be placed back at the end of the queue and invite the next person on the list.

NB: This will require you removing the member from the Waiting List and adding them again – thus the date is reset.

If you need help on managing a waiting list on Beacon, please contact the Groups Coordinator or the Assistant Groups Coordinator. We are here to help.

#### 8.8 Size of a Group

Is there anything else that could be done to allow a member to join your activity? Please advise the Groups Coordinator team if you have a member who you cannot accommodate. We are not suggesting that places can be created, but it does allow the Groups Coordinator team to work proactively on looking at how new groups could be offered. For example, Out & About groups are a classic case of demand often exceeding capacity. Recently, we have experimented with a new concept in running an O&A group, which is in its trial stages but may be a way forward for the future.

## 9. Problem Solving

Sometimes issues can arise within a group that disrupt the smooth running and can spoil the enjoyment for everyone. Don't leave a problem too long before trying to resolve it. Talk to the Groups Coordinator if you are unsure how to resolve the problem or just want someone to explore options with.

## 10. Issues between Group Members

- 10.1 Where there is potential for friction it is advisable to begin by bringing it into the open. Either you or another person could try to facilitate a discussion either with the members concerned or with the whole group, but it is important that the facilitator remains neutral and non-judgemental.
- 10.2 If you cannot reach a resolution speak to your Groups Coordinator or a member of your committee. If a situation does not resolve and becomes acrimonious your committee may need to implement their disciplinary policy.

## PART SEVEN

### Out & About Groups

**Section One – Existing O&A Groups** – who, due to a change of leadership or needing additional support, require advice on various aspects of running an Out & About group and their associated trips.

**Section Two – Launching new O&A Groups** – written to give advice to whoever may be setting up initial meetings and advice for the new Group Leader, Deputy/Assistant Group Leader and/or Group Treasurer.

All the information in both sections has been shared by a number of the Out and About Leaders (past and present) who have lent their experience, advice, and suggestions. If further advice is needed, contact the Assistant Groups Coordinator, who is himself an O&A leader.

#### SECTION ONE – EXISTING O&A Groups

##### 1. Planning Meetings – Held Yearly or Twice Yearly

- You need to contact the Groups Coordinator to book a meeting room for you (most meetings are held at St. Paul's in Northgate).
- Advise what size room you think you may need.
- If you advise the Assistant Groups Coordinator how many members you have in your group, they understand the room requirements.
- Do you have a preferred time and date for your meeting.
- Dependent on room availability it's best to suggest a couple of dates/times to the Assistant Groups Coordinator.
- Check with your group assistants and/or group treasurer to ensure you can all attend the meeting.
- Confirm the chosen meeting date with the Assistant Groups Coordinator.
- Once the time and date of the meeting is confirmed back to you, you'll need to contact all your group members to advise them. Some groups operate using email, some use WhatsApp extensively for replies, and others need to use the telephone as some of their members do not use email or smartphones.  
NB: If you need assistance in setting up a WhatsApp group, please contact the Groups Coordinator.
- In your message:
- Ask for replies from your members to confirm their attendance or absence.
- Suggest that the members come up with ideas of trips they will be willing to organise  
NB: Dates when the trips are run can be discussed at the meeting, but it will be helpful if they have an idea of what month they are free to organise a trip.  
And, if you need some ideas to suggest, previous outings over the years given to you – contact the Groups Coordinator for an up-to-date list.

## 2. At the Planning Meeting for Existing O&A Groups

There is a new door entry system at St Paul's. Please speak with the Assistant Groups Coordinator so you know how you can access the building on the day of your meeting and how the entry system works for your members attending the meeting.

- Seating will need to be laid out.
- Pass round an Attendance sheet so you can record who is at the meeting.
- Arrange for your Assistant Group Leader to make notes whilst you are running the meeting – especially when it comes to ideas and names of those who volunteer.
- Ask what trips are suggested.  
Mention any that have been sent to you in advance of the meeting.
- Trip organisers – ask for volunteers to assist in organising trips.  
It is recommended that a small team get together to do this – for example 2 to 3 people sharing the tasks. Members might already know others so would be willing to work together to organise a trip. Note who they are.
- Some existing O&A groups aim for several projected trips through the year – others prefer to concentrate on a few at a time. At this stage it's quite helpful to try and identify which organisers might be volunteering for what month.
- Have sheets of paper available so that you can write down the suggestions, the organiser (and team) and then pass these around. This is to get the members to express their initial interest.  
NB: Until a trip has a confirmed date, their interest is provisional at this stage.
- Ensure the sign-up sheets are circulated properly, and gather them up at the end of the meeting. If there are a few sheets being passed round, (and especially if you have a large gathering) it's a good idea to check that all the attendees have seen the sheets. It can get a bit convoluted with sheets wending their way around a group!
- Find out from your group are they willing to travel by train, car, bus, and coach.  
If car, how many willing car drivers do you have who will take others with them. Also check how far they are willing to drive.  
If train, how many of your group members have railcards, and if bus – how many of your group have bus passes.

## 3. After the Meeting

1. Draw up a list of the proposed trips and who will be organising these trips (the teams). If known, what month is being suggested.
2. Send out the information to all members, and ensure you include those who were unable to attend the Planning Meeting.
3. Depending on the number of volunteers and suggestions, you may like to ask those not in attendance what trips they would be willing to volunteer to organise – and do they know of any other member who would assist them.
4. Write to the volunteer organiser teams and ask them to get back to you with a suggested date for the trip as soon as possible.

## 4. Trip Organiser (TO)

### Researching a Trip

Research the venue that you are interested in and phone them for information if there isn't very much on their website. Current group leaders have estimated that this research can take 2 to 3 hours.

The Trip Organiser will firstly determine the following basics for the trip:

- Where the trip will be to
- The itinerary for the trip, including times for departure and return
- The date the trip will take place.
- Also need to identify any unusual potential risks that the Members might incur during the trip, such as walking on a cobbled street.
- Complete a Risk Assessment – [See Appendix 9](#)
- When planning the trip, the give consideration as to whether the trip will be suitable for u3a members who have mobility issues or use a wheelchair.
- Does the trip have to be booked in advance?
- How to get there?  
Accessible by public transport?  
Does a coach need to be booked – or is the trip by Train, Bus, Car?  
If a Coach is required, then the TO should discuss that with the Crawley u3a Treasurer. See Arranging a Coach Trip.  
Is car-share necessary?  
Price of the journey?  
Times of transport?
- Cost per member?
- Do they do group rates? *A group entrance fee is a discount on the normal one*
- Is there a tour available?  
Does this need to be booked in advance? What is the cost?
- Is payment due in advance or paid on the day?
- Is there a minimum or maximum number of visitors?
- What about cancellations?
- Anywhere nearby for refreshments, food, and drinks?
- Does a Waiting List need to be prepared if spaces are limited?

### Advice on a Proposed Trip

If a trip is planned after a meeting, and interest needs to be established:

- Once the research has been completed then a summary outline for the trip covering the above issues should be sent by the Trip Organiser to the Group Leader.
- Ensure all the relevant details are included.
- The GL should ask the members to indicate if they are interested in going on the trip.
- Maintain a list of the Members interested in the trip

## Communicating with your Group

Please note that all tasks outlined have suggested roles indicating who will be doing them. Part of this is dictated by access to the Beacon computer system that allows emails to be sent to group members.

However, it is up to each group how they communicate with their members, but always make sure the information on your group membership is up to date on Beacon so that messages go to the right people and contact anyone without email by phone or letter.

Using Beacon is a key factor for any Group Leader and advice on using Beacon is available from the Group Coordinator, including how to add members and using the system to email group members.

Some groups operate using email, some use WhatsApp extensively for replies, and others need to use the telephone as some of their members do not use email or smartphones. NB: If you need assistance in setting up a WhatsApp group, please contact the Groups Coordinator.

For payments, one would hope that you have a Group Treasurer, and all cheques can be sent directly to that person. Sharing the tasks listed here, and ensuring that the Group Leader is kept informed of the progress of any trip, is essential for the success of your group.

## Confirmed Trip

- Send out confirmation plans for the trip.
- When booking venues, some may require payment in advance. If this is necessary, then the appropriate payment should be collected from each member.  
NB: If an advance payment is required, then the Trip Organiser should arrange for the venue to provide an invoice. Once this is received an Account Form O5 should be completed and that plus the invoice passed to Crawley u3a Treasurer for payment. Alternatively, the Trip Organiser can pay the costs themselves and then reclaim the money by completing and submitting an Account Form O4.
- Make sure you tell the group members where to send the cheque: i.e. the name and postal address. All cheques should be payable to "Crawley u3a". No variations on this are permitted.

TIP: When members are paying for a trip, each trip needs to be paid for separately for Banking purposes so ensure that members know this. In addition, they should be advised to write their membership number on the reverse of the cheque, and also the trip date & destination. This helps the Group Treasurer enormously if someone has enclosed several cheques in one envelope.

- If more information needs to be shared with those members going on the trip, then either the Group Leader or Trip Organiser can contact the members directly by email or phone.

- Complete an Accounts Form O3 (blank copy on the [Crawley u3a website](#)) and pass that and the money to the Treasurer for them to bank. Any issue with collecting payments should be discussed directly with the GL & Treasurer.
- Before the day of the trip, having either carried out a site Risk Assessment or gathered information from the destination website(s), a form should be completed and sent to all members who are attending the trip. This can be a simple advice sheet as exemplified in [Appendix 9](#). Or see [Crawley u3a website – Group Leaders – Forms – Risk Assessments](#)
- The day before (or as near to the trip departure date as possible), the Trip Organiser should request the Group Leader provide them with a schedule from Beacon of the members' emergency contacts. The Trip Organiser is then responsible for ensuring that schedule is available for use on the trip.
- In addition, obtain from the Group Leader the basic first aid kit that has been distributed to all O&A groups.
- On the day of the trip the Trip Organiser is the leader and responsible for marshalling the members through the planned itinerary.
- All Account Forms are available for download from the [Crawley u3a website](#), or from the Treasurer.

### **Additional Advice**

- Using the Hawth Theatre as a meeting point is sometimes possible, as is leaving extra cars in their car park while you are out, but this must be arranged with the Hawth beforehand.
- Coaches can also pick up there with prior arrangement, but is not always possible. Therefore, [Crawley Bus station](#) is the most viable alternative.
- Trips by train are very useful and the usual arrangement is to meet at Three Bridges Station at a time suitable for the train you wish to catch. Of course, [Crawley](#) and [Ifield](#) stations are also an option, but trains through to London Thameslink don't always sync with train departures from Three Bridges.
- If using trains, members must purchase their own ticket, preferably beforehand, as the ticket office is very busy and can cause delays. Most group members will have senior railcards which will enable a discount. Rail networks offer a 3 for 2 Group Saver too.

NB: Following experience from existing O&A Group Leaders, it is worth noting that it is both time consuming and a worry to try and arrange those without a railcard to group with others in the same situation – trying to get members together at the Rail Station to coordinate this is difficult. Unless this has been arranged by members themselves to make a Group of 3 prior to the day of the trip, it is not recommended.

- For some trips, it may be advisable for the Trip Organiser to do a 'trial' trip before the day to ensure that you know how to get there, location of toilets, local pubs, bus routes and bus stop locations, roadworks etc. You can then confidently lead on the day. It is also recommended that two of you do this to cover Health and Safety requirements, and should, for any reason, one of you not be able to make the trip, there is always cover in leading the trip.

NB: Expenses can be reclaimed from the Treasurer for these trial excursions from your Group's funding.

## 5. Coach Excursions

### Using WH Motors

We have set up a corporate account (Client Account Number U3T001) with WH Motors, which should both simplify the administration and, in the longer term, provide evidence that will place Crawley u3a in a position to negotiate better rates from the company.

If you use WH Motors, the procedure will be:

- a) Group Leader contacts WH Motor and places an order, quoting Client Account number U3T001
- b) Treasurer will receive email confirmation and invoice.
- c) Treasurer will forward confirmation to Group Leader
- d) Treasurer will pre-set payment of invoice for two days before due date.
- e) Two weeks before event, Treasurer will send a completed Account Form 5 (Payment Request) to the Group Leader to sign and return. This will act as the confirmation that the invoice can be paid and provide the documentation required for auditing purposes.
- f) Invoice will be paid, and confirmation email sent to the Group Leader.

### Further Advice:

- If a Group Leader needs to make changes to a placed order, then they should do that directly with WH Motors.
- If a Group Leader cancels the order, contact WH Motors direct and email the Treasurer to let them know.
- If a different Client account number is used when ordering from WH Motors, then it will be assumed that the associated paperwork, (both confirmation and invoice) will go directly to the Group Leader who will then have the responsibility to ensure the Treasurer is provided with a completed Account Form O5 and associated invoice to generate a payment to the company.

### Using an Alternative Coach Company

Group Leaders have the obligation to ensure they get the best value for money for the members when planning trips, and of coach hire they have the freedom to use whichever coach company they choose. However, before agreeing to any financial arrangement with a coach company you should seek approval from the Treasurer.

Having sought approval, it should also be noted that if a Group Leader makes a booking with an alternative Coach company this will not trigger the automatic involvement of Crawley u3a's Treasurer in the process. Therefore, you should ensure that the Treasurer be kept informed at all times.

### **Conclusion of your Excursion**

It is important to note any Health & Safety issues that may have affected your coach travel, and ensure that they are reported to the Groups Coordinator and/or Treasurer as this will provide evidence to enable collective pressure to be put on the coach company to resolve problems and issues.

If you have any questions regarding booking coaches, contact the [Treasurer](#)

## **SECTION TWO – LAUNCHING NEW O&A GROUPS**

### **1. Information for Establishing a new O&A Group**

In the past, Out & About groups have tended to be run by a single Group Leader arranging all the trips, sometimes with the assistance of a person who collects the monies (a Group Treasurer). However, this can be seen as a burden on one person, and therefore the structure of some existing, and all new O&A groups are evolving and will now be run, as far as volunteers allows, as follows:

#### **1.1 Structure**

- Three key roles:  
Group Leader, Assist/Deputy Group Leader, and Group Treasurer
- The Group Leader will be responsible for the organisation of the group, liaising with the Groups Coordinator, and liaising with all the members of the group.  
It is envisaged that they will remain in post for a maximum of 12 to 18 months, before stepping aside.
- Deputy or Assistant Group Leader will assist the Group Leader.  
It is envisaged that at the end of the Group Leader's tenure, the Deputy/Assistant Group Leader will then move up and take over, with a new deputy/assistant.
- Group Treasurer will be responsible for collecting all monies in respect of any trip organised that requires payment of invoices or central payment at a venue.

In addition, Trip Organisers are needed

Each member joining the group will agree to organise trips/outings on a rotational basis. Trips will be organised by teams of 2 to 4 members of the group. This should then work out at that each team of members organises 1 trip per year. Teams will be able to volunteer at a Planning Meeting.

The aim of this structure is to provide some continuity within the group, mentoring of any new group leader, and sharing the tasks amongst the group.

## 1.2 Operating Premise

- To organise between 10 to 12 trips a year.
- Group size – 40 to 50 max

## 1.3 Introduction Meeting for a New O&A Group

The first thing that needs to happen is an Initial Meeting for those members who have signed up as interested in the new O&A group.

It is likely that one of the Committee might be facilitating the first meeting for the new O&A group, and at that meeting that person will need to get the members to agree to manage the new group as it is assumed that the Committee member will not be managing the group after the initial meeting. They may give additional guidance and support, but core responsibilities will be given to the group members.

## 1.4 Arranging a Meeting

- Contact the Assistant Groups Coordinator to book a meeting room at St Paul's.
- Advise what size room you think you may need.  
Do you know how many members have expressed their initial interest and been registered on Beacon for this new group? Ask the Assistant Groups Coordinator if you don't know and then an appropriate room can be selected.
- Ensure you, as the meeting planner, have access to the new O&A Group on Beacon, as you will need to be able to email the members.
- Do you have a preferred time and date for your meeting.  
Dependent on room availability it's best to suggest a couple of dates/times to the Assistant Groups Coordinator.
- Check with anyone else who may be assisting you at this Introduction meeting to ensure you can all attend the date chosen.
- Confirm the chosen meeting date with the Assistant Groups Coordinator.
- Once the time and date of the meeting is confirmed back to you, you'll need to contact all the group members to advise them. Some groups operate using email, some use WhatsApp extensively for replies, and others need to use the telephone as some of their members do not use email or smartphones.

### In your message:

- Ask for replies from your members to confirm their attendance or absence.
- Ask the attendees to come up with ideas of trips they will be willing to organise  
NB: Dates when the trips are run can be discussed at the meeting, but it will be helpful if they have an idea of what month they are free to organise a trip.  
And, if you need some ideas to suggest, previous outings over the years can be supplied by the Groups Coordinator. Ask for an up-to-date list.

There is a new door entry system at St Paul's. Please speak with the Assistant Groups Coordinator so you know how you can access the building on the day of your meeting and how the entry system works for your members attending the meeting.

### Meeting Day

- Seating will need to be laid out.
- Pass round an Attendance sheet so you can record who is at the meeting.
- Arrange for anyone assisting you to make notes whilst you are running the meeting – especially when it comes to ideas and names of those who volunteer.
- Ask what trips are suggested.  
Mention any that may have been sent to you in advance of the meeting.
- Trip organisers – ask for volunteers to assist in organising trips.  
It is recommended that a small team get together to do this – for example 2 to 3 people sharing the tasks. Members might already know others so would be willing to work together to organise a trip. Note who they are.
- Some existing O&A groups aim for several projected trips through the year – others prefer to concentrate on a few at a time. At this stage it's quite helpful to try and identify which organisers might be volunteering for what month.
- Have sheets of paper available so that you can write down the suggestions, the organiser (and team) and then pass these around. NB: Until a trip has a confirmed date, their interest is provisional at this stage.
- Ensure the sign-up sheets are circulated properly, and gather them up at the end of the meeting. If there are a few sheets being passed round, (and especially if you have a large gathering) it's a good idea to check that all the attendees have seen the sheets. It can get a bit convoluted with sheets wending their way around a group!

Find out from your group are they willing to travel by:

- i. Train – if train, how many of your group members have railcards
  - ii. Car – If car, how many willing car drivers do you have who will take others with them.
  - iii. Also check how far they are willing to drive.
  - iv. Bus – and if bus – how many of your group have bus passes.
  - v. Coach – you may not wish to be ambitious enough to attempt coach trips until the group members feel that they have the confidence to run these type of trips as it is somewhat advanced.
- You may also wish to enquire how many of your group have National Trust membership cards for any potential trips out.

### Conclusion of Meeting

- Wind up the meeting summarising what has been established, and advise that an email will be sent to all the members (those attending and those absent).
- Of course, the possibility that no members presented themselves to take on the roles required has to be considered. If members have not made any decisions on their role yet, then the Introduction meeting will need to close without a confirmed future, but hopefully someone will come forward in due course.
- However, if there are confirmed role takers, then the final task will be, to speak with the Group Leader, Assistant Group Leader, and Group Treasurer about their roles.

### After the Meeting

- Send out a summary of the Meeting to all members, and ensure you include those who were unable to attend.
- Pass over responsibility of the communication to the new Group Leader and provide them with a list of the proposed trips and who will be organising these trips (the teams). And, if known, what month is being suggested.
- Depending on the number of volunteers and suggestions, you may like to suggest to the new Group Leader that they ask those not in attendance what trips they would be willing to volunteer to organise – and do they know of any other member who would assist them.
- Recommend to the new Group Leader that they write to the volunteer organiser teams and ask them to get back to them with a suggested date for the trip as soon as possible.

## PART EIGHT

### Health & Safety

All Group Leaders must make themselves aware of emergency arrangements in their chosen venue in case of accident, fire or other emergency and should relay these arrangements to all group members. Please remember to include any new members joining your group after the start of term.

Special attention should be paid to access to defibrillators.

Group members should be encouraged to inform the Group Leader if they are aware of any group member experiencing health issues or other problems. When appropriate this information should be passed onto the Members Coordinator and Welfare Assistant to help us maintain pastoral care of our members.

#### 1. Risk Assessments

- 1.1 The new Risk Assessments made available by the Third Age Trust in September 2022 covered a greater range of activities and were much improved compared to those previously provided. Crawley u3a risk assessment forms were subsequently developed by Crawley members for even greater relevance, and where they exist it is up to the Group Leader whether the Third Age Trust or Crawley u3a Risk Assessment is used.
- 1.2 Organisers of an event, whether this be a day trip, a walk, a sports event, or another type of activity that need to be assessed for any risks prior to the event, should complete a Risk Assessment. Any risks should then be communicated to all members joining the activity. This should be done by person who has assessed the activity, or by the Group Leader.
- 1.3 The Risk Assessment form itself does not need to be shared; just the mitigating actions that a member is responsible for whilst undertaking the activity.
- 1.4 For the full range of Risk Assessment forms available, these can be found on the [Crawley u3a website – Group Leaders – Forms – Risk Assessments](https://u3asites.org.uk/crawley/page/127442)  
<https://u3asites.org.uk/crawley/page/127442>

#### 2. Accidents and Incidents

- 2.1 If an emergency incident happens during a group, and the emergency services are required, contact them as soon as possible. It is recommended that, if you are in direct contact with your Venue administrator, that you also advise them of the incident at the same time.
- 2.2 Consider whether the Emergency contact person named for the member needs to be advised.

- 2.3 Group Leaders should also advise the Secretary by telephone in the first instance. Incident Report forms can be found on the [Crawley u3a website – Group Leaders – Forms](https://u3asites.org.uk/crawley/page/132428) <https://u3asites.org.uk/crawley/page/132428>
- 2.4 The Secretary will inform the Committee, and the Venue when appropriate.
- 2.5 When completing the Incident Report Form, copies must be signed by the injured party and the Group Leader, and then sent to the Secretary as soon as possible after the event.
- 2.6 For those groups running sessions from St Paul's, please also refer to the [Appendix 5](#) given by this venue.

### 3. Insurance & Risk Management

- 3.1 The Third Age Trust nationally organise insurance cover for all affiliated u3a's activities.
- 3.2 An overview of the insurance policies provided by the Third Age Trust is on the Crawley u3a website Documents page and entitled 'Crawley u3a Guidance on Insurance'; or can be requested from the Secretary. Group Leaders should study section 8 FAQs particularly carefully. The essential matters to note are:
  - The u3a insurance policies are intended to protect the u3a and those who run individual u3as, such as Trustees and Group. They do not provide standard personal or accident insurance to members participating in activities.
  - To minimise the future costs of insurance cover Group Leaders are required to undertake risk assessments in advance, though for room-based groups the members sit rather than move around these will require little more than checking fire exits.
  - Note that, as stated in 2.8 above, to protect the insurance cover newcomers or visitors are not permitted to attend more than two "taster" sessions per u3a (not per Group).
- 3.3 A copy of the current Policy Schedule is also under the document section on the Crawley u3a website though this is a technical document and all relevant information from this is included in this guidance.
- 3.4 Should an incident take place which could conceivably give rise to a future insurance claim then an Incident Report Form (available to download on the Crawley website) should be completed and sent to the Secretary as soon as possible after the event.
- 3.5 If a Group Leader becomes aware that a member, or third party, is intending to make a claim against the Third Age Trust insurance the Secretary should be contacted as soon as possible. The Secretary will then get in touch, if necessary, with both the person intending to make a claim and the Third Age Trust.

3.6 Any insurance excess (see the Crawley u3a Guidance to insurance for a definition of this and the amounts for the different insurance types) and any financial cost or liability that is not covered by insurance at all, will have to be funded directly from Crawley u3a reserves. Therefore, Group Leaders should seek to minimise potential risks in all activities that are undertaken.

3.7 Any questions on insurance matters should be directed to the Secretary.

## 4. Open Day

The Open Day event is primarily designed for Crawley u3a to be able to advertise itself as an organisation to the general public. Please note that this event is being fully reviewed, and further information will be added to this Guide when it is known how the event will run in future.

## Policies and Procedures

There are several policies that we, as members of Crawley u3a, need to be aware of, and these slightly expand when we are also Group Leaders.

You need to be aware of:

- Finance
- Data Protection
- Safeguarding
- Equality, Diversity, and Inclusion (EDI)
- Accessibility
- Complaints
- Incident Reporting

All **Policies and Procedures** can be found on the Crawley u3a website – Group Leaders – Policies & Procedures: <https://u3asites.org.uk/crawley/page/132428>

## Copyright

A CLA licence allows some materials within limits for educational use within groups. A licence can be purchased from the Third Age Trust for £60 a year. The Trust also provides a PPL (Phonographic Performance) PRS licence to cover the playing of music and an MPLC licence to cover the showing of films. These are included in the fee that u3as pay to the Trust. There are limitations to each of these licences and if you are going to be using copyright material in any form, for example, printed, audio or pictures, please check the [support for u3as section of the national u3a website](#) at <https://www.u3a.org.uk/advice> for further details.

## Appendix 1 – Contact Information

Treasurer – Graham Friday – 01293 408817

[treasurer@crawleyu3a.org.uk](mailto:treasurer@crawleyu3a.org.uk)

Groups Coordinator – Janet Newson – 07775 583220

[Access.coordinator@crawleyu3a.org.uk](mailto:Access.coordinator@crawleyu3a.org.uk)

Assistant Groups Coordinator – Peter Beckley – 01293 446415

[peter.beckley@yahoo.co.uk](mailto:peter.beckley@yahoo.co.uk)

Communications Coordinator – Sue Parker – 01293 911357

[sueparker5@yahoo.co.uk](mailto:sueparker5@yahoo.co.uk)

Secretary – Margaret Lloyd – 01293 514475

[secretary@crawleyu3a.org.uk](mailto:secretary@crawleyu3a.org.uk)

Chair – Jim McGough – 01293 459213

[chair@crawleyu3a.org.uk](mailto:chair@crawleyu3a.org.uk)

Vice Chair – Alan Rew – 01444 811507

[cdsploermel@gmail.com](mailto:cdsploermel@gmail.com)

Membership Assistant – Jean Manuel

[Jeanmanuel6@virginmedia.com](mailto:Jeanmanuel6@virginmedia.com)

Beacon Administrator – John Walton

[johnmwatson@yahoo.com](mailto:johnmwatson@yahoo.com)

## Appendix 2 – Classification of Groups

CLASSIFICATION OF GROUPS – 25 August 2024				
Home Based and Ad hoc	Room Based		Outings, Physical Activity and Special Interest	Fixed Duration Groups
	St Paul's based	Other Venues		<i>None at present</i>
Italian Colloquial	Science for non-scientists	Mah-jong	Gardening 1	
Storytelling 1	French Experience	Bamboo Pipes	Gardening 2	
Storytelling 2	Family History	Painting & Drawing	Out & About 1	
Needles	Poetry	Bridge for Fun 1	Out & About 4	
Weekenders	Folk Music	Bridge for Fun 2	Out & About 6	
Bus / Strollers	Folk Dancing		Out & About 7	
Live Music	Singing for Fun		Out & About 8	
Urban Sketching	Ukelele		Amblers	
	Quizzing		Amblers Extra	
	Quiz Group 2		Walkers 1	
	Book Group 1		Walkers Extra	
	Film Circle		Cycling	
	Art Appreciation 2		Pétanque	
	Art Appreciation 3		Table Tennis	
	Topical Discussion 1		Smartphone Photographic	
	Rummikub & Canasta		Tennis & Pickleball (Outdoor)	
	History		Short Mat Bowls 1	
	Italian for Beginners		Short Mat Bowls 2	
	3D Paper Crafting		Theatre	
	Exploring Local History		Air Rifle	
			Allotment	
			Afternoon Exercise	
			Pickleball (Indoor)	

## Appendix 3 – Classification of Expenses

The primary objective of the u3a is to create an environment within which members can be comfortable and confident to undertake self- learning and develop their skills and knowledge.

### **Costs that can be claimed**

To facilitate this Group Leaders can claim the following costs in respect of both the management of their Group and the preparation and delivery of the Group's activities.

- Printing/Photocopying – for both managing the group and to facilitate the delivery of group activities.
- Postage for sending out communications to Group Members or sending documents/cheques to Executive members (e.g., Treasurer, Secretary, Communications Coordinator).
- The purchase or hire of written or published material for use in group activities.
- Consumables to aid the learning experience during group activities.
- Subscriptions to magazines, libraries, and other sources of learning material.
- Costs associated with the preparation of group activities, including scouting/recce activities for trips & events. (Any cost of scouting/recce activity is limited to one person per trip).
- Production and distribution of advertising material for the promotion of the group.
- Hiring in of Guest Speakers to facilitate learning. (Limited to one per year per Activity group).

### **Costs that cannot be claimed**

Refreshments provided and consumed during group activities.  
Membership fees to other organisations.

***If any individual item of expenditure is going to cost over £20, prior approval of the Treasurer is required before the cost is incurred.***

***If there is an item of cost that does not fit under any of the above heading, then discuss it with the Treasurer before incurring any costs.***

## Appendix 4 – Restricted Fund

### Access Criteria and Claiming Procedure

#### **Background**

The Restricted Fund represents surplus money generated in previous financial years from Group activity that cannot be attributed to individual groups, plus separate donations received from Members or the public.

In accordance with Charity Commission rules and the Financial Reporting Standards this Fund can only be used to support similar activities from which it was originally generated.

The Crawley u3a Committee, as Trustees must administer the Fund, in a way that is transparent and fair to all Activity Groups.

To administer the funds in a fair and equitable way the Committee has established the following criteria that it will use to consider any application of the fund and the procedures to be followed in applying for those funds.

Applications for use of the fund can either be made:

- directly from an individual Group, or a combination of Groups,
- deriving from a Fee review instigated by the Committee,
- derived from the closure of a Group, or
- by request from the Treasurer.

#### **Criteria**

The Committee, will use the unallocated balance to allocate money to groups that are:

- struggling to cover their costs due to a falloff in membership numbers,
- incurring sudden and unexpected costs,
- where the deficit has arisen from a change in policy or external change in governing legislation, or
- as a 'start-up' grant towards the initial costs of getting the group up and running.

#### **Procedure**

Where a request has been received from a Group or combination of Groups to cover deficits, the Committee will initiate a 'Fee Review' that will ensure the following series of actions have been worked through with the affected Group(s), to ensure their finances cannot be improved before considering the application.

During a 'Fee review' the Group(s) will need to show that it has:

- Marketed the group to improve attendance numbers.
- Reviewed the Group's cost base to see if costs can be reduced (i.e., alternate accommodation, revised operating times etc).

- Review the delivery methods of the group, to see if things could be done more efficiently and effectively.
- Considered the scope to increase the fee to balance out the costs being incurred.

Once this has been done the Committee will receive a request from the Treasurer to approve the application.

Where a request arises from a change in internal Policy or from changes in external legislation or guidance, then the Committee will receive a report from the Treasurer setting out the background and implications before considering the application.

### **Start-up Grants**

When setting up an activity group costs might need to be incurred, which can be seen as a barrier to Members bringing ideas for new groups forward. New groups will therefore be allocated a grant of up to £100 to cover initial start-up costs.

These costs could include:

- hire of rooms for initial meetings,
- purchases of small equipment to get the group operational, or
- cover income shortfalls due to low attendance numbers until the group has got established.

The Treasurer will provisionally allocate the grant to the group once it has received the go ahead from the Committee. After the Group's first year of operation the Treasurer and Group Leader will review and agree the actual amount to be allocated. If the costs exceed £100, then the Group Leader will have to take the excess into account when setting their Group's ongoing fee level. If the costs are less than £100 then the unused amount will be returned to the Restricted Fund.

## Appendix 5 – Guidance on using St Paul’s Venue

Whether you use St Paul’s as a Group Leader, arrange an ad-hoc meeting, or attend as a member, there might be information here that is of benefit to you.

### Keyholders

All Group Leaders regularly using St Paul’s will be issued with a set of keys. Keyholder Forms will be signed, and a copy retained by the Group Leader and the administration at St Paul’s.

When becoming a keyholders for St Paul’s, it is a requirement that keys should not be passed between members of the group or anyone else.

If any Group Leader cannot attend a group meeting, but the group can still go ahead, or if anyone books a room at St Paul’s, but is not a keyholder (for example you may be holding a one-off meeting for your group), contact St Paul’s by email as soon as is possible.

St Paul’s will then arrange for someone to be available to let group members into St Paul’s and confirm arrangements. The email address is: [crawleymethodistchurch@gmail.com](mailto:crawleymethodistchurch@gmail.com) (Nicola is the contact person).

*Note: Please ensure that any requests for amendments to room booking arrangements should be made to the Assistant Groups Coordinator – not directly to St Paul’s.*

If anyone has any difficulty in getting confirmation that this arrangement has been made, please contact the Groups Coordinator or Assistant Groups Coordinator as soon as possible.

### Room Access

For everyone who use the rooms at St Paul’s, groups should not enter their room more than 5 minutes before the start of the Group’s contracted hours, and then only if the room is unoccupied.

Groups should also ensure that they leave the room on time, especially if another group is due to use the room immediately after you. In very cold weather, church staff, when asked, have given us permission to go into the room if it is unoccupied to turn on the heaters, but room set up, etc, should not be made prior to the start of your room booking.

If your members are able to access St Paul’s early (perhaps due to the Loaves & Fishes tea bar being open), please advise your members to wait in the Foyer area.

If you find your contracted hours too short, please contact the Assistant Groups Coordinator to discuss extending your booking time.

## **Door Security & Safeguarding**

St Paul's have a Secure Door Entry System operating whenever the Main Door is closed.

A guidance document will be given to all new Group Leaders, and this can be used to explain the procedure to your Group members. In addition, a Safeguarding procedure has been introduced, and each member attending a group is required to sign the Form. If members belong to more than one group, they only need to sign the form once.

Copies of both the Safeguarding Form and the Door Security procedure are available from the Assistant Groups Coordinator at any time. For new group leaders, these will be supplied as part of your welcoming pack.

Please see the Guidance from St Paul's on accessing the building.  
Secure Door Entry System

## **Leaving a Room 'as found'**

Rooms at St Paul's should be left "As You Find It: Clean and Tidy."

Everything should be left as found with any tables or chairs etc. used, put back where they originated from, tabletops cleaned with the antibacterial spray provided and the floor is swept and left clean. Also, if the chair trolley is moved, it is placed back by the table tennis tables and any chairs which are used on the stage are stacked back along the window wall on the floor (relevant to the Main Hall). If any of the bins used are full, the bag should be removed from the bin and put in the large bin in the main car park. Spare rubbish bags are kept under the one currently being used.

### Where are the cleaning materials?

Anything you need to clean the floor in your room at the end of each hire session e.g., broom, Hoover, dustpan & brush, catch-mop, are located in the Cleaning cupboard (bolted white louvre doors) opposite the Disabled Toilet.

## **Accident Reporting**

If there is an incident at St Paul's that needs reporting, in addition to completing the u3a Incident Report form, Group Leaders are also required to complete an Accident Book held at St Paul's. It is located on the shelf immediately on the right-hand side as you enter the canteen kitchen near the First Aid Box.

## Appendix 6 – Taster Sessions

### A. Not u3a members of any u3a organisation

If a person is not currently a member of any u3a group in the UK, under the terms of the insurance cover funded by the Third Age Trust (the u3a umbrella organisation in the UK), they may attend up to two separate u3a events (this might be one meeting each of two different Groups, or one Group meeting and one Monthly meeting).

### B. Taster Sessions for existing Crawley u3a Members (whether they are Full members, Associate members or Guest members)

By definition, Associate and Guest members of Crawley u3a are full members of another u3a. Associate members can attend our monthly meetings and other events held for all members as well as joining groups. Guest members can only attend groups.

An existing u3a member will have the eligibility (depending on the information set out below) to:

- a. attend an Activity Group with the first session free of charge, and
- b. there will be no restriction on the number of groups a member may try out free for the first time.

### Arrangements for New Groups

All new groups will have a free of charge first 'Start Up' session offer to all existing u3a members. If the member then wishes to join the group, and there are weekly, fortnightly, or monthly session fees applicable to that group, fees will be due.

In addition, a member may attend a Planning Session for a newly formed group free of charge (these Planning Meetings are particularly relevant for establishing a way of working for new Out and About Groups). If the member then wishes to join the group, and there are weekly, fortnightly, or monthly session fees applicable to that group, a member may attend the first session free of charge also (Start Up Session). After that time, if the member joins the group, fees will be due.

### Exceptions

However, it is important to note that a Group Leader will have the freedom to decide on whether to permit a member a free first session for their group. Reasons for not offering free first sessions may include:

- a. Availability within the Group (for example, if the Group currently is full and may also have members waiting to join that group, it may not be practical to welcome someone to try out the group when there is no possibility for joining said group).
- b. Welcoming someone into a private home.
- c. The member does not have the requisite fitness levels (particularly relevant for sporting activity groups).

### Additional exceptions to Groups that do not offer free first session opportunities or Start Up sessions for new groups will be:

- d. Groups that are run in tandem with another group, and members can (with the Group Leader's permission) swap between the groups (e.g., Bridge for Fun 1 & 2, Short Mat Bowls 1 & 2, Gardening 1 & 2, and others may be applicable). Groups such as these should be considered as being one group.
- e. Trips & Outings arranged by a Group.
- f. Groups that run on a short, Fixed Term basis (i.e. run for one or two terms only).

## Appendix 7 – New Group Proposal Proforma

This form is designed to allow the Groups Coordinator and/or Assistant Groups Coordinator to discuss with any member their proposed idea for a new group. Core questions will be heavily dependent on the type of activity. For example, the proposal might just be a “testing the waters” exercise, or it might be a “fully rounded” idea for a group; it might be a fee-paying group, or an ad-hoc group requiring no group fees. Questions will be therefore appropriate to the type of proposal.

Question	Answer
<b>Is this an Indoor, Outdoor, or Sport Activity group?</b>	
<b>Topic of the Group?</b>	
<b>Do you see this as a long term or short-term group?</b>	
<b>How would you sum up the activities of the group (e.g., discussion, tuition, excursions)?</b>	
<b>Is there an Outline of what the proposed new Group Leader has written to advertise their group?</b>	
<b>Is there a fitness level required to join the group?</b>	
<b>How often will it run? (e.g., weekly, every 2 weeks, monthly, etc)</b>	
<b>Is there a maximum number of members for the group?</b> <i>NB: We also need to consider minimum for the viability of the group.</i>	
<b>When is the proposed start date for the group?</b>	
<b>What is the preferred time of day?</b>	
<b>What is the preferred day of the week?</b>	
<b>The length of time for each session?</b>	
<b>Where is the session to be held? (e.g., an existing venue, home, or new venue)</b>	
<b>External Venue Hire costs? (e.g., what are the room costs?)</b>	
<b>Are there any Equipment costs?</b> <b>Start Up as an initial outlay</b> <b>Ongoing (maintenance, etc)</b>	
<b>Are there any Health &amp; Safety requirements</b> (e.g., Air Rifles needed Insurance)	
<b>Do you know of anyone who might join your group who could:</b> <b>Assist with Attendance Sheets, fees collection and accounting (e.g., Group Treasurer)</b> <b>Step in to run the group if you were unable to attend</b> (e.g., Deputy Group Leader)	

<b>If relevant, do you know of anyone who is qualified to give professional help to the group?</b>	
<b>How do you propose to communicate with your Group?</b>	
<b>Do you currently use a computer? NB: Establish whether the new Group Leader can do this, or if adjustments are required.</b>	
<b>Are you familiar with the Crawley u3a website and how to use it?</b>	

## Appendix 8 – Additional Information

### Learning Aids and Material

It is recommended that all Group Leaders should visit the Third Age Trust website on a regular basis as new learning materials is being constantly added.

### Related documentation

All these documents can be access on the [Support for u3as webpage at: https://www.u3a.org.uk/advice](https://www.u3a.org.uk/advice)

- Interest Groups Matter
- Growth Matters
- Finance Matters and Finance FAQs
- Risk assessment templates
- Equality, Diversity, and Inclusion sample policy
- Data Protection Policy template
- Accessibility sample policy (England, Scotland, and Wales)
- Insurance FAQs

### Third Age Trust Support, Advice, and Information

All members can also contact the u3a office for information and advice by calling 020 8466 6139 or emailing: [u3a.office@u3a.org.uk](mailto:u3a.office@u3a.org.uk).

## Appendix 9 – Risk Assessment Example for O&A Trips

### CRAWLEY U3A OUTDOOR ACTIVITY

For: \_\_\_\_\_

<p><b>Activity</b></p>	<p><i>Details such as:</i></p> <p><i>Trip Destination</i>  <i>Departure Time, and where from.</i>  <i>Any specific departure arrangements (such as times of trains)</i>  <i>Any specific arrangements on arrival at the Trip Destination (such as Tour included)</i>  <i>Time the group will leave the destination, and meeting point.</i></p>
<p><b>Organised by Crawley u3a</b></p>	<p><i>Include the Trip Organiser's name, &amp; their Contact Number and any other details of those who may be assisting on this trip.</i></p>
<p><b>Advice given</b></p>	<p>Follow instructions given by group leader at all times.</p> <p>Ensure that you are aware of any times and departure points for this trip.</p> <p>Wear comfortable walking shoes and be prepared for all weathers!</p> <p><i>Any other advice that may be relevant for this trip. Things you may include could be about the walking surface, or if there are steps to navigate. Much of this will have been advised when you first gave information about the trip, but it is worth adding it to the Risk Assessment too.</i></p> <p><i>And you may wish to add</i>  <i>“Ensure you have advised the Trip Organiser of any limitations you may have before the day of the trip that may affect your involvement in all activities”, but this again should have been established before the day.</i></p> <p>Take care of your personal safety at all times in unfamiliar surroundings, and do not undertake any risky activities.</p>
<p><b>Notes</b></p>	<p>Your u3a group leader will have a basic first aid kit available if needed, and should also be informed of any accident or incident involving any of our members during the trip.</p>

## VERSION CONTROL

<b>u3a</b>	<b>Handbook for Group Leaders</b>		
<b>Version</b>	<b>Description of Changes</b>	<b>Date of change</b>	<b>Review by</b>
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