



WARRINGTON u3a
(Registered Charity No: 1085069)

GUIDELINES FOR GROUP LEADERS (v.12. September 2025)

INTRODUCTION

These guidelines are not intended to cause you unnecessary administration but to help you avoid potential pitfalls and ensure that Wu3a complies with national legislation, Charity commission requirements and u3a objectives. The guidelines are periodically updated but GLs should seek further information from the Warrington u3a website or Committee if they are uncertain on any point. Reference to GLs also includes those in a position of leadership within a group, and the content of these notes should be communicated to them.

1 MEMBERSHIP

- a) Prospective members are allowed to attend up to one monthly General Meeting and two Group Meetings before becoming u3a members, and will be covered by U3A's insurance. They should be advised to contact the relevant GL before attending a Group Meeting.
- b) Membership is open to those who are not in full time employment, but over the age of 18. People with disabilities are welcome but are advised to check with the group leader to ensure facilities are adequate. A carer for a disabled member may attend without charge while accompanying a disabled person.
- c) GLs should **NOT** accept membership subscriptions, as this causes confusion, delay, and difficulty with our Gift Aid application. Instead, the GL should refer prospective members to our website or to the Registrar at a General Meeting,

2. ORGANISING AND COMMUNICATING WITH YOUR GROUP

- a) GLs should ensure that everyone attending their group meetings is either a current member or is present as a prospective member (see 1a above). A membership card should be shown to the GL during either the first or the second meeting of the group as proof of current membership and this should be recorded on the contact details form (see below). Current membership status can also be checked via the spreadsheet sent periodically to all GLs by the Registrar (or checked directly with the Registrar if in doubt).
- b) GLs should always be ready to increase the membership of their groups. If limitations of facilities or the needs of a sequential syllabus dictate that a group cannot admit new members, the GL can turn new members away but should inform the Committee
- c) GLs should have a record of the name and email address (or postal address via self-addressed envelopes) of all their members for routine correspondence about group events. A form is available on the website for GLs to use for this purpose.

- d) A web page is provided for each group, which leaders should try to keep up-date with both general information and specific events. Contact the Webmaster for details.
- e) Warrington u3a also has a Facebook page called the Warrington u3a Forum which can only be viewed by members. This is a useful social media tool for GLs to post details of upcoming events.
- f) GLs can also publicise events on the rolling PowerPoint which is shown at each monthly general meeting.
- g) Group leaders are encouraged to attend the monthly Wednesday afternoon social/general meetings, especially if they have specific activities they want to promote. A limited number of tables are available for group leaders.
- h) **To comply with data protection legislation** GLs must preserve the confidentiality of any information supplied by members which must only be used for the purposes of Wu3a. This permits the exchange of data between the Committee and among GLs. Member's details should not be passed to any person or organisation without permission from the Member. GLs should ensure that group members' personal data cannot be viewed by the rest of the group (e.g. by leaving this in a folder in a shared cupboard at a venue.)
- i) Where a photograph is taken containing identifiable members at a group event they must give their permission for it to be published on any WU3A document or website.
- j) **When circulating a group email** send it to yourself and use the BCC (blind copy) field to share with everyone else. Do not use the CC (courtesy copy) field or any visible list of recipients. The person receiving your email will then only see their own address. (If you are not sure how to do this please ask for help.
- k) Members without access to email should not be disadvantaged and Newsletters and other communications deemed important should be made available to these members as appropriate, preferably via a self-addressed envelope, as above. The use of email buddies should be encouraged and details passed on to the Registrar.

3. SAFEGUARDING YOUR MEMBERS AT MEETINGS & IN EMERGENCIES

- a) GLs should know the address and postcode of their meeting venue. be familiar with all fire exits and draw group members' attention to these. GLs should act responsibly in protecting the members as far as possible, i.e. in the event of an emergency check that everyone has been evacuated, and by considering the needs of disabled members.
- b) Ensure your members sign in at the beginning of each session/or tick them off on a register so you know who needs to be accounted for in an emergency e.g. if the building is evacuated for a fire alarm or accounted for on an outside activity.
- d) Group members should be encouraged to have available the name and telephone number of a friend or relative to contact in an emergency e.g. as ICE (*In case of Emergency*) on a mobile, or a card in bag or wallet. Since they should only use an emergency contact number if requested by the member, it is not normally necessary for GLs to have records of emergency contacts apart from on excursions. If a member is injured or otherwise seriously ill during a meeting medical help should be summoned without delay.

e) **Any incident involving damage or injury should be fully reported to the Committee** in writing using the Accident Report Form or by email including similar information. Include this information if applicable.

- Person to whom the incident relates (name, address, membership no.)
- Person reporting the incident (name, address, membership no.)
- Incident details: where, when, how occurred and to whom
- Injuries, if any: description, how treated at the scene, any hospital admission
- Damage to property
- Witnesses (name, address, membership no. if applicable) Photographs (if possible)

f) GLs should consider all aspects of the fitness of individual group members for the activity, and suggest that they discontinue if judged unsuitable. A GL may exclude an individual from a specific meeting on Health and Safety grounds. If the member does not comply with, or objects to the decision, the GL should promptly inform the Committee.

g) **Warrington u3a has a written procedure for resolution of problems and grievances** arising between members in whatever capacity. Refer to the Chairman for details. GLs do not have authority to permanently exclude members from meetings, except as specified in Section 2b above.

h) Wu3a conforms to the Governments policy on the **Safeguarding of vulnerable individuals**. A copy of this policy along with the necessary forms to be completed when there are possibly breaches of Safeguarding policy can be found on the website.

4. GUEST SPEAKERS FOR GROUP MEETINGS

A leading principle of the u3a is that tuition should come from within the ranks of Wu3a, unpaid, by members sharing their expertise. However, GLs may occasionally want to have access to external expertise to support the group's activities.

a) Each Group is allowed up to £100 per annum for the cost of external guest speakers. Any further costs are at the expense of the individual members of the Group. Payment of external speakers is usually by bank transfer. Group leaders should obtain the speaker's bank account details prior to the session and advise the Treasurer of this plus the amount and date of payment. Please obtain receipts for any payments and confirm to the Treasurer that the session was delivered by the speaker to unlock their payment.

b) We do not pay fees to tutors to run on-going classes. We offer free membership (insurance cover) to tutors who do not attend other classes.

5. EQUIPMENT AND RESOURCES FOR GROUP MEETINGS

a) Wu3a purchases and maintains equipment for use in classes and our main venues now have access to a laptop and projector which should be kept in the designated locked cupboard at the venues. Group Leaders should ensure that any defects, or missing items or accessories are reported **promptly** to the Equipment Officer.

- b) The laptops share the same passwords which should be the only ones used by GLs. **DO NOT set up your own accounts on these machines** to store personal data unconnected to Wu3a activities.
- c) In the event of equipment malfunctioning the Equipment Officer and/or the Committee will authorise repairs and in the event of serious problems which make repair uneconomic **ONLY THE COMMITTEE AND NOT GLs CAN AUTHORISE THE DISPOSAL OF Wu3a ASSETS**.
- d) When additional equipment is required for a class, two quotes should be supplied to the Equipment Officer. The Equipment Officer may assist in the selection of appropriate equipment if necessary. On notification of approval by the Equipment Sub-Committee, the Treasurer will supply a cheque, arrange a bank transfer or reimburse costs. A receipt and/or invoice must be provided in each case. A request for equipment is rarely rejected, but GLs should not proceed before approval.
- e) Any personally owned equipment supplied by GLs or members is covered by insurance (see section below), but it is the owner's responsibility to ensure that it is fit to use. Electrical equipment is routinely PAT tested, and personally owned items used for Wu3a purposes will be included.
- f) GLs are asked to share resources with their group by the IT provided e.g. through digital images and/or a PowerPoint presentation rather than by photocopying which is now prohibitively expensive to use by routine. If GLs consider photocopying is essential on a specific occasion please obtain prior Committee approval for an agreed sum. GLs should encourage members to use digital copies or print documents themselves when possible.
- g) Limited secure storage facilities are available at Winmarleigh House, Alford Hall and The Old School, Fairfield Street.

6. ACCOMMODATION ISSUES

- a) Wu3a Accommodation Officer is your contact point for matters concerning our venues as they have negotiated our conditions of use for each venue on behalf of the Committee. Timetables for the group sessions detailing group meeting dates and venues can be found on Wu3a website.
- b) **The normal wu3a year runs from 1st September to 30th June.** During that period, the cost of hiring rooms for any group that meets not more than once a fortnight, arranged through the Accommodation Officer, will be met from Wu3a funds, subject to the following exceptions.
- Summertime-only activities will be funded throughout the summer season.
 - Groups may choose to continue to meet during the summer recess of 1st July to 31st August (if the relevant rooms are available), but before commencing members will be asked to meet the full costs of room hire during those months. Please contact the Accommodation Officer and Treasurer before commitment.
 - Groups may meet weekly but their members will be asked to meet the excess costs incurred. Please contact the Accommodation Officer and Treasurer before commitment.
 - Subject to funds being available, improvements to these conditions may be agreed by the Committee for specific groups where the group has demonstrated the commitment and capability to increase meetings.

c) GLs should inform the Accommodation Officer as soon as possible if a pre-booked room is not required for any reason, (or not available), as a courtesy to our room providers and to avoid unnecessary cost to Wu3a. Where extra accommodation is required, apply to the Accommodation Officer rather than approaching the venue directly yourself.

7. FINANCIAL ISSUES

a) Under Charity Commission rules, Wu3a funds must only be used for the Objectives of Wu3a, as stated in the Constitution, i.e. the purpose of the group. For any other purpose, e.g. refreshments, outings, etc group funds collected from group members or payments for specific items should be used. The provision of materials for later personal use is difficult to legislate, and will be decided on a case-by-case basis.

b) GLs should not hold excessive amounts of money in any form – guidance from the Trust suggests £50 maximum, larger sums being held, ring-fenced for the group in the Wu3a Social Account by the Treasurer. If a group fund is collected, either for social purposes or consumables, e.g. refreshments, materials, etc, an annual statement should be provided to members and the Committee to account for the money.

c) GLs should not be out of pocket as a result of leading a group. Therefore reasonable expenses (e.g. stationery costs) but **excluding** travel to group meetings, meals and refreshments) may be reclaimed through the Treasurer. Receipts should be provided where normally available. However, GLs are asked to minimise such claims by using cheaper alternatives (e.g. email) where available. If in doubt, please contact the Treasurer for guidance before incurring expense and advice on how to claim expenses.

8 OUTINGS, TRIPS, HOLIDAYS

a) Group bookings should be made by WU3A cheque or bank transfer from the Social Account. Payment from the organiser's personal funds should be avoided.

b) Some out-door groups may require the leaders to make exploratory visits to potential venues. It is regretted that the payment of travelling or other expenses for these activities from Wu3a funds would be unrealistic due to the potential cost to Wu3a. We are grateful to those who undertake these visits.

c) It is recommended that GLs do not arrange group payment for travel, entrance fees or accommodation if individual arrangements are possible.

d) Holidays or study trips involving group travel or accommodation should be arranged wherever possible via a third party operator, i.e. travel agent, coach operator, etc. It is recommended that such payments should be by the member to the operator/venue (the organiser may of course collect these payments).

e) Some operators offer a free place to the organiser. This should be regarded as a shared discount. However, the efforts of the organiser are appreciated and their additional costs should be minimised.

9 INSURANCE

The u3a Trust capitation fee we pay provides insurance to indemnify Wu3a, GLs and members engaged in a u3a activity against claims by any party e.g (another member, room owner, the public, etc) against them. Wu3a or members' equipment is covered against loss or damage, as is loss or damage to a member's home while holding a u3a meeting there, and indemnity for members organizing a travel activity. The policy does not provide personal accident or travel insurance, which is the responsibility of the individual.

10 CAR SHARING (applicable to all members; GLs should explain this to their groups)

Although most u3a car owners are happy to give another member a casual lift or have reciprocal arrangements, this should not be habitually taken for granted, especially where long journeys are concerned and with rising energy costs. As a guide to sharing costs, calculate the outward and return journey cost, plus any parking fees incurred; divide this figure by the total number of people in the car, including the driver; each passenger to pay the resultant amount to the driver. This does not constitute "plying for hire" and most insurers accept such arrangements, but if in doubt, check with the insurer.

12 AND FINALLY

Thank you to all GLs for all the time and effort you give to running your groups and allowing your members to share your enthusiasm for your special interest.