

Cheadle (Staffs) u3a

GROUP LEADER HANDBOOK

CHARITABLE STATUS

Cheadle u3a is a registered charity and as such we cannot promote none u3a events, allow sponsorship requests or the selling of raffle tickets for other organisations, at any of your group meetings.

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SECTION 1

Welcome to our u3a Group Leader team

Having set up your group, via the Groups Co-ordinator, as a Group Leader, you play a vital role within our u3a.

This Handbook is designed to help and guide you. For any additional advice or support contact your Groups Coordinator who will be happy to help. Email:

group-coordinator@theadleu3a.org.uk

GROUPS COORDINATOR

This role includes:

- 1) Arranging venues and negotiating rental agreements in line with Health & Safety requirements, and the activity being carried out
- 2) Inducting new Group Leaders regarding administrative requirements and providing ongoing support.
- 3) Communicating with Group Leaders on matters relating to their role via email, telephone, group visits and Group Leader meetings.
- 4) Supporting with promoting group activities where necessary

Room bookings/cancellations

Inform the Groups Coordinator as soon as possible if you intend/need to cancel your group meeting and the date you close your group for holidays i.e. Bank holidays, Christmas, summer, etc. to avoid unnecessary overcharging for premises.

Similarly, if you wish to book a one-off event associated with your group (e.g. an art exhibition, or craft day), please contact the Groups Co-ordinator.

GROUP LEADERS

Are eligible for concessionary membership during the time they are Group Leaders.

Main Responsibilities:

- 1) Ensure all your group activities are carried out in a suitable venue
- 2) Keep all building access codes and keys secure
- 3) Check that the building is empty and the lights are out when locking up premises after a meeting
- 4) Notify the Groups Coordinator of any group meeting cancellations in advance to enable room bookings to be cancelled and avoid unnecessary hire charges
- 5) Administer the finances for your group
- 6) Maintain a group register

- 7) Ensure that all your group's attendees are current members of Cheadle u3a or one of its Neighbourhood Link partner u3a's; Stafford, Cannock Chase (Rugeley), Burton on Trent, Stone and District, Uttoxeter and Stoke South
- 8) Attend the Group Leaders' Meetings.
- 9) Ensure that your group's web site page is kept up to date (either personally or via the Webmaster). Email webmaster@theadleu3a.org.uk

You may choose to delegate some/all of the administration (register, collection of session fees, etc., risk assessment, etc., to another member(s) of your group.

Joint Group Leaders

A request to the committee can be made for joint Group Leadership with the provision of concessionary membership for both Group Leaders

If one of the joint leaders steps down from their role, the Groups Co-ordinator should be informed and the concessionary membership will cease at the end of the calendar year

GRANTS

A start-up grant of up to **£50** is available for all new groups if necessary to cover essential group equipment.

A smaller sum of money (**up to £25**) is available **if required** for each Group Leader to draw upon annually to cover essential equipment and materials costs for the group as a whole. Any requests for monies in excess of this should be put in writing by email for full Committee consideration.

Members of craft and sports groups are expected to purchase their own equipment and consumable items, but a selection of such items may be purchased for use by new starters for a limited period (3 sessions).

Books, CDs, DVDs etc

Where these are purchased by Cheadle u3a for use by group members, they are to remain the property of u3a. These items are to be marked up as u3a property and books (e.g. foreign language text books) should not be written in. It is important to maintain details of the distribution of these and ensure that any members who give up membership of the group return such items to you. Alternatively, members may purchase these items for themselves.

All expense claims should be documented with receipts attached where applicable.

Expense claim forms can be located on the Cheadle u3a website in the Group Leaders section accessed via the Members Information page.

MEMBERSHIP

ELIGIBILITY FOR MEMBERSHIP OF THE u3a

Membership of the u3a is open to adults who have the time and interest to engage with and benefit from the range of groups on offer.

Individual queries regarding membership issues should be referred to the Committee via the Groups Co-ordinator, who will advise the Group Leader appropriately.

MEMBERSHIP SUBSCRIPTIONS

Prospective u3a members attending their first session are not required to have paid their membership subscription. However, if they intend to continue in the group you are encouraged to give them a Membership Application form and ask them to complete it and send it, with their subscription and a stamped self-addressed envelope, [cheques payable to Cheadle (Staffs) u3a], or advise them to take it to a coffee morning and hand it to the Membership Secretary where they can pay by cheque, cash or card before they attend their second session. Membership fees should not be accepted by Group Leaders. Membership forms are available on our website or available at the coffee morning and Cheadle Library.

VISITORS

Individual u3a and non-u3a visitors can attend one 'taster' session of a group, with the prior approval of the Group Leader, without paying the group fee.

You should insert names of visitors on the register (marked with a 'V') and denote whether u3a member or non-u3a visitor.

Members of Link member u3a's may join an activity at the discretion of the Group Leader and on production of their current membership card, **provided there is no waiting list.** - Paid up Cheadle members take priority

GROUP SIZE

The maximum numbers in a Group depends on venue size and the activity.

SECTION 2

HEALTH & SAFETY

Regular Venue risk assessments will be conducted by a Cheadle u3a representative

The GL should also briefly check the venue each time it is used to ensure things are as they should be and report any identified changes to layout/potential risks to the Groups Coordinator

Prospective new group members should be given the opportunity to assess whether they are capable of participating safely and independently in any group activity, especially those of a more strenuous physical nature.

If a u3a member needs to bring a carer/companion when attending u3a activities, it is permissible under our insurance cover. Providing the carer/companion does not attend any u3a activities as an individual and committee permission has been given. If the carer/companion is attending purely in the capacity of a 'carer' and not taking part in the activity they will be covered as they will be considered an 'extension' of the member. If the 'carer' is providing support and also taking part in the activity as an individual then they will need to be a member. Should a member not be able to participate independently in u3a activities a carer/companion is essential as it is not acceptable for insurance reasons for the responsibility for care to be left to fellow members unless there is a specific arrangement in place with an individual member who may well be a friend.

All members of Cheadle u3a have a responsibility to be aware of health and safety issues in the conduct of their activities. It is important that individuals are able to take full responsibility for their participation in u3a activities/events. Should the situation arise where a member wishes to attend an interest group or activity but is worried that he/she would not be able to fully participate without help, please contact the Groups Coordinator. group-coordinator@cheadleu3a.org.uk for advice on how to proceed.

CHILDREN There is no insurance cover for those who would not meet the criteria for membership. Children should not attend u3a activities unless as part of a public audience

In the event of difficulties developing with existing members of a group, the GL should refer the matter to the Group Co-ordinator, but (in urgent cases) has the authority to suspend the member pending an enquiry by the Committee.

Health & Safety Outdoor Activities

Activities like **Walking** have a Disclaimer for its members, which also includes H&S advice. A copy can be found on our Cheadle u3a website, go to the members only page and look in the Group Leaders section

It is necessary for each leader to make a risk assessment before a particular day's event involving its particular location, difficulty etc.

Field/Study Trips

A specific checklist related to the u3a aspects of the visit should be used in connection with a Field/Study Trip. Travel provision (and hotel accommodation if appropriate), is covered by the relevant travel companies concerned. Coach operators/drivers are responsible for ensuring seat belts are worn and if toilet facilities are available, though it is advisable for the trip organiser to ensure this is dealt with.

ACCIDENT / INCIDENT REPORTING

In the event of an accident/incident during an activity, an **accident/incident report form** should be completed by the GL and sent (preferably via e mail) to the Health & Safety Officer, who will retain a copy on file. Accident report forms can be found on the Cheadle u3a website, go to the Members only page and look in the Group Leaders section. Alternatively you may ring the Health & Safety Officer

Telephone number 07825 670069

Email: health&safety@theadleu3a.org.uk

Remember that once a group is set up with the prior approval of your Committee, and provided local Guidelines and Procedures are adhered to, you are fully protected by the Liability Insurance Policy provided by the Third Age Trust.

*Members of the u3a should be encouraged to carry next of kin details and/ or put **ICE** (in case of emergencies) against a number or numbers in their mobile phone book.*

ALMONER

Group Leaders are requested to contact the Almoner whose role is to act as the link between the organisation, members and their families in times of distress (e.g. after a bereavement, serious ill-health or hospitalisation of a member). To effectively carry out this role, the Almoner needs to be informed of such situations as soon as possible.

Email almoner@theadleu3a.org.uk

SECTION 3

REGISTERS

The Registers Secretary will provide your group register on a quarterly basis and will require your completed registers in return. Contact the Registers Secretary to arrange. registers@theadleu3a.org.uk

Your group register should contain the membership number, name and telephone number of each and all group members. You should add any new members to the register and record the attendance of each member at each session in the register. Should there be an incident which requires evacuation during your group session you should use the register to ensure everyone is off the premises.

At the end of each quarter you can either e-mail or WhatsApp a photo of it to the Registers Secretary ensuring the photo is clear to read (preferred method) or hand it to the Registers Secretary at the monthly coffee morning, alternatively post to it to the Registers Secretary, including a stamped addressed envelope if you require a new register to be posted back to you. A new register will be sent to you by e mail or by post. If you have difficulty with the process please liaise with the Registers Secretary.

Registers are held on file against any future audit requirements or incident queries.

DATA PROTECTION

Group Leaders should only hold the names, telephone numbers and e-mail addresses of their group members (unless other information given voluntarily.) this information must be kept secure. Permission from group members must be sought prior to taking their photograph during group activities and additionally prior to placing onto the u3a website or social media. Our Cheadle u3a Data Protection policy and Social Media Policy can be found on our website in the Members only section.

FINANCE

All cash collected at a session and the number of attendees must be entered in the group register and the total taken entered in the cash received column.

All group session fees are currently £2 per member per session (except the Group Leader), with the exception of Social Activities e.g. Cinema, Day Trips, Dining Club, and Holidays, which are paid by every member at every session. Group sessions can be paid for in cash or via the pre-paid session card, or in some groups: with a credit/debit card. If paid for by the pre-paid session card the register should be marked with 'PP' and if paid for via the card machine 'CM'. Additional fees may be requested from members attending group sessions to cover extra expenses – e.g. a fee to cover the costs of an invited outside speaker.

Group Leaders are allocated to a Cheadle u3a Hub Cashier who will transport the group's cash to the bank. It is the responsibility of the Group Leader to take their cash to their allocated Hub Cashier. The Hub Cashier will provide a receipt bearing the amount and date paid to the cashier. This receipt should be kept with the group register. The register should be sent to the Register Secretary at the end of each quarter. Alternatively,

separate photos of the register and matching receipts can be emailed to the Registers Secretary. The registers and receipts should be clearly legible in the photo. Registers and receipts will be kept on file for auditing purposes.

All expenses must be claimed on the approved expenses claim form as per Financial Policy (July 2025) and reimbursed by the Treasurer. Exceptions to the rule may apply under special circumstances with agreement of the Committee and dealt with on an individual basis.

All other costs, such as admission charges and materials used by individuals should be met by each individual involved.

Field/Study/Social Trips

The organiser will provisionally arrange a trip and agree all the payment arrangements with the Treasurer. The organiser and the Treasurer will agree a 'sales' price usually including a small mark-up as a contingency. Once these arrangements have been agreed the organiser is responsible for making the booking. The prospective attendees will book with the organiser but all payments should be paid to the u3a social account. **Cheques should be made out to "Cheadle (Staffs) u3a social account" not to the organiser. All payments must be made by the Treasurer, the organiser should not pay the supplier with a personal cheque or credit card.** All arrangements are made with the full involvement of the Committee

EXPENSES

You may claim expenses incurred from the operation of your group. Examples of what may be claimed are:

- 1) Re-imburement of expenditure for equipment purchased for the Group in accordance with the Guidelines stated in this handbook
- 2) Expenses incurred in contacting members of the Group by telephone, e-mail or post and any associated printing and stationery costs.

Note: Group Leaders should maintain records of car journeys, telephone calls etc for which they are to make claims although it is sufficient when making a claim to summarise this information (e.g. 20 return journeys of 8 miles/total of 160 miles for travel between home and Guild Hall @ X pence per mile) and the time period covered by the claim, where applicable. Group Leaders should submit expense claims to the Treasurer at the latest by **15 December** in order that they may be reconciled before the accounting year end at 31 December. Contact the Treasure for the current mileage allowance

Email: treasurer@theadleu3a.org.uk

Expenses must be claimed on the approved expenses claim form, as per our Financial Policy (July 2025) and reimbursed by the Treasurer. Claim forms can be accessed from Cheadle u3a website; on the Group Leaders page in the members' only section. They are also available from the Treasurer at the Coffee Morning

EXPENSES FOR PERFORMING GROUPS

Members of performing groups who go out to give performances on behalf of Cheadle u3a are entitled to reimbursement of their travelling expenses from any donations they receive for their performance.

As a guide travelling expenses should be calculated as the distance from Cheadle town centre to the venue, not from each member's home address. Members should be encouraged to car share. Any donated funds received over and above travelling expenses should be passed to the Treasurer, who will note such amounts in the U3A Annual Accounts. Contact the Treasurer for the current mileage allowance

Email: treasurer@theadleu3a.org.uk

RESOURCES

A photocopier is located in Cheadle Guild Hall. Photocopier access codes are only issued to Committee members and Group Leaders as appropriate and should not be shared with others. Photocopying is only available in black and white. The photocopier is for sole use of u3a materials unless otherwise authorised by the Executive Committee. To request photocopier access contact

group-coordinator@theadleu3a.org.uk

SECTION 4

COMMITTEE MEMBER DETAILS

Role	Name	Email
Chair	Roy Scott	chair@theadleu3a.org.uk
Vice Chair	Val Cooksey	vice-chair@theadleu3a.org.uk
Business Secretary	Tracey Callan Johnson	business@theadleu3a.org.uk

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Treasurer	Gill Birks	treasurer@theadleu3a.org.uk
Membership Secretary	Rae Parr	cu3a.membership@theadleu3a.org.uk
Registers Secretary	Mags Kearney	registers@theadleu3a.org.uk
Groups Coordinator	Elaine Cunningham	group-coordinator@theadleu3a.org.uk
Social Secretary	Jenny Crump	social@theadleu3a.org.uk
Health & Safety Officer	Nick Cunningham	health&safety@theadleu3a.org.uk
Almoner	Jenny Crump	almoner@theadleu3a.org.uk
eNews Editor	Roy Scott	press@theadleu3a.org.uk