

PREFACE

Study and interest groups are a core part of the ethos of a u3a and one of our priorities is to ensure we have a wide range of successful groups available for members. The success of our u3a is the direct result of the inspiration, leadership and efforts of our group leaders.

We have prepared this guidance to help group leaders in setting up new groups and in running established ones. It sets out some ideas on starting up and running groups but also focuses on the support available within Frinton, Walton & District u3a (FWDu3a) and from elsewhere in our regional and national u3a networks. If you feel there are things missing from these guidelines or that they should be improved in any way, please inform the Groups Co-ordinator.

FWDu3a is a member of the Third Age Trust, a self-help learning cooperative and the Aims and Principles of the Trust are summarised in Annex A. FWDu3a is a charity with its elected committee members as its trustees. Those trustees are responsible for all aspects of the operation of FWDu3a, including its study and interest groups. As a result, all study and interest groups have to be formally approved by the Committee in order for the group to be recognised, insured and properly supported.

FWDu3a's study and interest groups are expected to be self-help cooperatives in their own right and, in particular, they are expected to be self-financing and self-taught as far as is possible. Notwithstanding the expectation of self-financing, the Committee as trustees of the charity, needs to be aware of the activities taking place in a group and of its financial state. Your immediate contact on the Committee is the Groups Co-ordinator.

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GETTING STARTED

If you haven't already decided, you will need to plan the following:

The purpose of the group.

When, where, how often and how you are going to meet.

The maximum number you can accommodate, both physically and practically in a learning or activity sense.

The time commitment involved.

What help is available to you.

You can plan these on your own or discuss these matters with those members who have expressed an interest at your first meeting.

Establishing the purpose of the group. You will need to consider the scope of the subject matter you are going to study or the interests you are going to follow (what the group is going to do) and the level at which the group will work (beginners, improvers or advanced).

Frequency, timing and duration of meetings. Be flexible at this stage and look at different models covering regular meetings, meetings arranged as and when, or even short courses.

Choosing a venue. You will need to take into account the size of the group and what the group needs such as chairs, tables, equipment and space for physical activities. Consider also the subject matter and whether it needs a neutral rather than a domestic setting, giving a formal or informal ambience.

Size of group. The appropriate size for the group will depend upon the subject matter, treatment and learning process and the accommodation available. Groups may vary in size from around half a dozen members to more than twenty and it may be helpful for the leader to have a deputy to keep a register of attendance. The register is important as a record of who is present at each meeting and of attendance trends.

Waiting Lists. If your group is full, the leader should keep a waiting list of members who want to join. We aim to avoid long waiting lists and to achieve this it may be necessary to have more than one group covering the same or related subjects. By keeping your Groups Co-ordinator informed, we can jointly decide when the list is long enough to attempt to form a new group.

How much time can you all commit? As the new group leader, you should decide how much time and expertise you will realistically be able to offer to the group and what you will expect of the group members in return. Do not over-commit yourselves.

What help is available? Find out what help is available locally, regionally and nationally:- Contact the National co-ordinator for your subject to see what help or material is available. Contact the Third Age Trust Resource Centre and register as a borrower. You will receive the Third Age Trust's Sources publication with Third Age Matters. More details are given below.

THE FIRST MEETING

There is a large body of research into later life learning that suggests that older people learn best when they are in control of their own learning. Participation by all members of the group should be encouraged from the start subject to any limitations that members might state initially.

You will need to agree your purpose, find out the skills and resources at your disposal within the group and decide on a way of working. It may be useful to have a hand-out for the first meeting in the form of a check-list that will focus the group and encourage shared responsibility for the success of the group venture.

Find out what members expect of the Group. Experience shows that a successful group will be clear about and share their expectations. If there is a wide variety of expectations, then consider forming more than one group and, if this is not feasible, then plan a programme in such a way that as many approaches as possible are included.

It is a useful exercise at the first meeting to get agreement to a short description of what the group hopes to do and how they hope to do it. This will subsequently form a statement of intent that will help to keep the group on track and will inform potential new members.

Discover the expertise within the Group. It is important to find out what knowledge and experience exists in the group and decide how these are going to be used to best advantage. You may be fortunate enough to have many group members able and willing to share their expertise or you may start with just one or even start with little or no obvious expertise. Shared learning does not mean that a group cannot seek to extend its learning base by inviting others to join them either permanently or for specific purposes. The ethos of u3a is that its members share their knowledge and experience freely but this does not preclude the use of a paid external speaker or tutor if that is desired by the group.

Agree the way of working. Many methods of working are used by u3a groups including:-

- Lectures

- Taught sessions with participation

- Shared presentations and discussions

- Skills teaching and physical activities

- Trips and fieldwork

All methods are legitimate, as part of the shared learning experience, providing they are suitable for the topic, use the skills available and are acceptable to the group. It is not necessary to choose one method all the time as different formats may be suitable for different purposes.

RUNNING YOUR GROUP

A few practical things will help you to run your group smoothly and will help ensure our u3a, as a whole, is run in an efficient and proper manner.

Keep a list of the members of your group, an attendance register and of anyone interested in joining but to whom you cannot yet offer a place. Ensure your members inform you in advance if they are not attending any specific meeting as this may allow you to invite another member on your waiting list. Reinforce this regularly with your members, particularly any poor attenders, as they may no longer really wish to be a member of the group. This will help the Groups Co-ordinator and yourself to decide on the option of a new group being formed.

Keep a simple record of what your group does and this can be used to brief our wider membership through our newsletter, website and notices. Groups are not private clubs and meetings or activities should be publicised for all the members of FWDu3a to see and consider. This is primarily achieved through our newsletters and Group leaders should be prepared to provide reasonably regular updates to the Newsletter Editor.

Study Group meetings, particularly in a domestic setting, usually include a tea or coffee break and it is customary, at their discretion, to contribute towards the costs of the host with the suggested amount currently being set at 50p per meeting.

Keep a note of your additional expenses such as photocopying, printing or hire of DVD's/Video's and ask your group members to share these costs. It is not expected that a group leader should be out of pocket in running the group for the benefit of other members.

SUPPORT WITHIN FWDu3a

FWDu3a is run by a Committee, elected by the members each year at the AGM. A Groups Co-ordinator has been nominated to provide Group Leaders with help and support. Your Groups Co-ordinator should be the first person that you turn to for help.

You may also need to have contact from time to time with the other members of the Committee as explained in these Guidelines and you will find the contact details of all Committee members listed at the front of our annual newsletter.

Help with Publicity. If you need help in publicising or reporting on your group's activities in our newsletter, website or at monthly meetings, please ask your nominated committee member.

Advice on Venues. Most of our groups meet in members' homes but some use hired accommodation of various sizes. Various size rooms are available at McGrigor Hall, Soken House and other venues can be used and you should contact the Vice chairman for details and help in booking. If you do decide to use a public venue, the hall hire must be covered by the group's meeting fee. Separate advice will be given by the Groups Co-ordinator on request.

Available Equipment. FWDu3a owns certain items of equipment, including a laptop computer, projector and video camera, and sound system that may be made available for use by groups. Such specialised equipment is held by certain Group Leaders and would need to be booked in advance for meetings and it may also be necessary for those Group Leaders to assist you in the use of such equipment. If you wish to know more or to borrow any u3a equipment, please ask your Groups Co-ordinator.

Insurance. In your group activities you are covered by Public and Products Liability insurance that is provided through the u3a Trust. This covers u3a members for loss due to accidental injury to another person or accidental loss or damage to property not belonging to them as long as it arises from or in connection with a u3a activity. Anyone giving lifts to fellow u3a members will be covered by their own motor insurance in the usual way. Should you ever experience such a situation, please contact the Chairman for advice and an Accident Report Form. Details of the insurance policy and a copy of the form may also be seen on the Third Age Trust website. A Risk Assessment / Health and Safety form is available from the Groups Co-ordinator. This should be completed and reviewed regularly.

Copyright. You should be fully aware of any copyright limitations before you copy material for use by your group members.

Financial Support. Each group should be self-funding and group members must cover all the normal running costs of their groups. However, if a group ever feels that there are exceptional circumstances, such as start-up costs or front-loaded costs, it may be possible for Committee to assist on a loan basis and you should contact your Groups Co-ordinator who will, in the first place, discuss your needs with the Treasurer.

SUPPORT FROM THE THIRD AGE TRUST

Third Age Trust Resource Centre. The Resource Centre in the National Office at Bromley, Kent has a collection of material, other than books, available for all u3a groups to borrow free of charge except for the cost of return postage. There are slides, videos, audio cassettes, CDs and DV's available in many subject areas. The Resource Lists are free and available on request.

You may register with the Resource Centre and you will be issued with a user number that will allow you to search the catalogue on line. Loans are for a period of three weeks but may be renewed for longer on request if not needed elsewhere.

u3a Newsletter and Sources. Members receive the National 'Third Age Matters' newsletter five times a year. This contains news from u3a's across the country, experiences, ideas, contact details and useful advertisements with some articles being of specific interest to Group Leaders.

'Sources' is the National u3a educational journal. Each issue has a subject focus but items on any matter relevant to education in the third age are welcomed. Within FWDu3a you will receive 'TAM' or 'Sources' by direct mail as part of your annual subscription.

National Subject Coordinators and networks. Group Leaders in individual u3as may find it useful to work together to share ideas and materials in any specific subject area. Many subjects have a national Subject Coordinator whom you can contact directly and these

details are given on the website. In some cases, there is also material available online that you can use or adapt to meet your specific needs.

On-Line Courses. A list of courses is to be found on the Third Age Trust website. Some have been written by u3a members in the UK, while some are from Australia, and their high standard has been recognised by a National Institute award for Adult Continuing Education. They are low cost, some untutored, with tutored courses costing slightly more. Although they may be followed individually, the material may also be used for groups. Untutored courses can be downloaded and printed for group study and you are also encouraged to use the Open University's 'Open Learn' courses.

Research Collection. A research collection is currently being built up by the Resource Centre as a reference point and covers research about older learners and by older learners on any subject. If you can offer such publications, or wish to study it further, please contact the Resource Centre.

Shared Learning Projects. A typical Shared Learning Project involves u3a members working with a local institution such as a gallery or museum on a project of mutual benefit. These cooperative ventures offer an exciting opportunity for shared expertise and learning. The Trust website describes what shared learning projects are, and how to start one, with regular reports of such projects in Sources.

A FEW RULES

Who can join a group? Membership of a FWDu3a group is restricted to current members of our u3a and, on an occasional basis, to members of neighbouring u3a's. In particular, we have a close connection with Tendring District u3a and members may access groups run by either u3a providing there are spaces. If you are in any doubt about a member's status, please contact the Membership Secretary for advice. Attendance by a non-member at a group meeting would disqualify that person, and possibly other group members, from u3a insurance cover.

Data Protection. The Data Protection Act requires us to store personal data securely, so as to avoid unauthorised or illegal use, and to restrict access to it to those who need it for the purpose for which it was collected. It covers all personal data whether stored in paper or electronic form and, in our case, is solely for the purpose of contacting and communicating with our members.

A group leader may hold contact details of members of the group but should not pass these to other persons without the prior approval of those concerned.

Group leaders are required to give their approval for their own contact details being circulated to all FWD u3a members.

E-mails circulated to groups of members should place the e-mail addresses in the "Bcc" box, and not in the "To" box as this inadvertently gives the e-mail address of each member to all the other members.

Use of paid outside Speakers and Tutors. One-off payments to external speakers for fees or expenses are not a problem. However, if you are planning to ask a freelance speaker to

run a class on a regular basis for an agreed fee, it is essential that you firstly check the person is registered with HM Revenue and Customs as a self-employed person and that they have a current public liability policy to a cover value of at least £2million.

The u3a insurance policy does not cover u3a members when a freelance speaker is being paid.

Financial Matters. As a charity, we are required to follow sound financial practices. This is one reason for the recommendations on bookings and money handling that may be given by Committee. If you have any queries about this area, please contact the Treasurer directly.

GOOD LUCK WITH YOUR GROUP!

| Date of Change: | Changed By: | Comments: |
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| March 2023 | KJ Riley | Guidelines approved and signed by the Trustees Steering Committee |
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