



Caves u3a

Guidance for Group Leaders

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Guidance for Caves u3a Group Leaders

Welcome

First of all, thank you very much for agreeing to establish an interest group. The success and vitality of Caves u3a depends on the contribution made by our group leaders. Our members benefit greatly from the range of groups we offer and we hope you will find your role as a group leader very enjoyable and rewarding.

You are not alone! Support is on hand

... from within your group

Although you will take a lead in running the group you do not have to take on every task yourself. Other members of the group should be encouraged to share the tasks, for example, by keeping the register, dealing with the Beacon computer system and/or website pages, collecting in money or writing items for the newsletter. You could find someone within the group to be a co-leader or deputy to help you with planning a programme and being willing to take over your role if you are away or unwell. Sharing tasks in this way makes your role easier and also ensures the continued existence of the group does not depend on just one person.

... from Caves u3a Committee members

Your first point of contact for questions or concerns is the **Groups Coordinator** who is appointed by the committee to offer support and advice to group leaders. The Coordinator also encourages the formation of new groups and offers them assistance in their early stages.

You may also need to be in contact with the **Treasurer**, the **Membership Secretary** and the **Website Manager**.

If you should encounter a problem or difficulty, do seek help from the Coordinator. All the members of the committee are there to facilitate and support your work as group leader so you should not hesitate to contact them when you need to. There will be an annual meeting with the committee for the group leaders and co-leaders to share ideas and information and to discuss matters of interest to the groups.

... from the National u3a body – The Third Age Trust

The Third Age Trust, which is the coordinating body for all the u3as nationally, has a website (Search for u3a.org.uk) where you can find information and ideas relevant to your group. There are Subject Advisers for most of the topics covered by Interest Groups. Many of these advisers have on their webpage advice, helpful materials, ideas or handbooks to support you in your role. Go to the website and follow the trail from Home>Learn>Subject advice, then scroll down to find the list of topics covered.



News ▾

Learn ▾

Click on 'Learn' for menu of topics.

Your role as Group Leader in our u3a

As leader you do not need to be an expert but you should

- show enthusiasm for the topic,
- use your skills and knowledge to organise the group's activities,
- encourage the group members to take part and to contribute their own skills and knowledge.

The aim is to achieve a supportive and friendly atmosphere which enables everyone to participate and to enjoy learning. The leader will guide the group in deciding the schedule, frequency and type of meetings needed to fulfil the purposes of the group. The group should be run democratically, following the principle "**by the members for the members**".

Each group will develop its own structure and way of working but it is important that every group follows the u3a ethos of **shared, participative and self-help learning**.

What's in this Guidance Pack

This guidance pack offers you advice and support in your role as a leader of a Caves u3a Interest Group. It is based on the advice of the Third Age Trust (the national body for the u3a movement) and of the Charities Commission since the u3a is an educational charity. Conforming to these requirements means that we meet our legal duties and can benefit from the insurance protection provided by the Third Age Trust.

Part 1 explores the role of a group leader and the requirements for any group: organising group meetings, administrative tasks and communicating with members and with the wider membership of Caves u3a. Part 2 provides more advice and information on aspects of the role.

Website locations

Please be aware that the location of material on a website may change. The instructions given in this guidance are correct in July 2025.

1. Record Keeping

! Must Dos

- Ensure that anyone attending a group meeting or outing is a member of Caves u3a, a 'Guest' member from another u3a in the Accord Network (see below) or an Associate member from another u3a. A person who is considering joining Caves u3a may attend three meetings before paying the membership fee. The Membership Secretary will provide the necessary application forms.
- Keep up to date the record of members on your group's list on our Beacon management system. This will also indicate to you whether group members have paid their membership fee.
- Ensure the information about meeting dates and venues on the Caves u3a website (caves u3a.org.uk) is accurate.
- Keep a register of those attending each meeting. You can print these off from Caves u3 website > Groups Page > Register but you may devise your own if you prefer. You may need to hand your register to the Treasurer if you have to submit accounts. Otherwise please retain the registers for three years to help us meet insurance requirements.



Good ideas

- Set a limit on the number of members you can accommodate in your group and enter this on your Group page on Beacon so it is clear when a group is full.
- Contact members who have not attended for a while to find out if they still want to be a member so you know if you can offer their place to someone else.
- Let the Groups Coordinator know if people still want to join your group when you have reached the maximum number you have set. It may be another group could be formed. You can add their names to your Beacon Member list and mark them as 'Waiting'.



More information

There is information on using the Beacon system in Part 2 of this guide and help is available from the committee.

The East Riding Accord network consists of Caves, Cottingham, AWAKE (Anlaby, Willerby & Kirk Ella), Howden and District, Hornsea and district, Swanland, Hessle, Driffield and Wolds, Pocklington, Beverley and District, and Holderness.

2. Communicating

! Must Dos

- Inform members of future meeting dates, times and topics. Remind them about a week before the meeting date.

- Help Caves u3a conform to Privacy and Data Protection Laws. This means not disclosing a person's contact details to other group members without permission.
- Use the Beacon system for sending messages to your group. This ensures that no-one's contact details are disclosed to another member. Groups may decide to use open group emails or What's App groups **provided this is with the agreement of all the members.**



Good ideas

- Ensure that the Newsletter editor has correct and up to date information about the dates, times and venues for your meetings.
- If you are not comfortable with using a computer or the Beacon system, get someone else in the group to do this on your behalf.
- Store a set message on Beacon so that you only have to make a small number of changes each time e.g. date, time, venue.
- Publicise your group, seek new members or just let the wider u3a know about what you do by sending information about your next meeting or news items about your activities to the editor of the newsletter. You can encourage members to do this on behalf of the group.
- Let the Groups Coordinator know if there is information you would like all u3a members to hear. It may be possible to set up a notice board or for an announcement to be made at the monthly general meeting.



More information

If, for some reason, it should be necessary to use your private email, always use blind copies. This means putting your own address in the To space and all other addresses in the Bcc space (You may have to click on this for the space to appear. It is easy to forget this and so infringe a person's right to protect their own contact details. The Beacon system does this automatically for you which is why we recommend that groups should use it.

We have to avoid infringing copyright so when publicising your group try to use photographs or art work created by someone you know who has given their permission for them to be used. Do not simply take things from the internet unless you know they are not subject to copyright law – most of them are and it lasts a very long time! Ask advice from the Coordinator if you are not sure.

Caves u3a has a Copyright Licensing Agency (CLA) Licence which allows multiple photocopying from books, journals and magazines, but only up to 5% of a chapter or article. It does not cover maps, charts or newspapers. Any photocopying of sheet music, or song lyrics is illegal unless they are out of copyright or covered by a licence. It is possible to find royalty-free materials on the internet but check carefully before using them.

On our membership application form we do ask people to agree to photographs being taken for our publicity but if you are taking photographs of a group activity, it is a good idea to make sure members know about it and to check if anyone wishes to be excluded. It is in any case courteous to do this.

3. Meetings

! Must Dos

- Decide on a venue suitable for the group's activities. This may be a member's home or hired premises.
- Be aware of the safety of your group members. There must be a completed Risk Assessment Form for every place where groups meet, including private homes. This is required so that we are all covered by our insurance policy. You may be asked to complete a form but help is available from the committee. The assessments will be kept on file and you will be given a copy. The Coordinator will ask you annually to check that the form is accurate.
- Request and complete an Incident Report form within 24 hours if there is an accident (or near miss) or someone is taken ill at a group meeting even if it appears trivial. This should be passed to the Chair who will retain it for possible future reference.



Good ideas

- Before each meeting make a quick visual check for any hazards such as trailing cables and try to ensure, before and during the meeting, that the room is as risk free as you are able e.g. encourage members to be aware of carefully 'parking' mobility aids and handbags.
- If you are hiring a venue we have not used before try to obtain a copy of their risk assessment policy. However, when completing our u3a form remember we are only interested in any risks that arise from how we use the venue.



More information

- Information about the venues we use is available on the Beacon system and you can add notes about the venue you use on your Group section of this system.
- More information about insurance is available on our website Get in Touch > link to 'A Question of Insurance'.
- If you are starting a brand new group there is an information sheet about what to cover in your first meeting in Part 2 of this Guidance.

4. Money Matters

Caves u3a aims to make the handling of money by group leaders as simple as possible. However, to ensure we benefit from the insurance provided via the Third Age Trust and meet the requirements of the Charities Commission some formal procedures need to be in place.

! Must Dos

- Agree with your group an amount of money to be collected from each member in order to cover the cost of your activities. All groups must be self-financing. The only exception is a start-up grant for establishing a new group. More advice on money transactions for different types of meeting place can be found in Part 2.
- If you are hiring a venue, consult with the Treasurer and agree what records are appropriate for your group. You will need to report your income and expenditure, supported by receipts, to the Treasurer each quarter. Consult with the Treasurer about how to do this.
- Make clear to the group members how any money collected is being used and that any money collected, or equipment purchased with it, is the property of Caves u3a. Any surplus accumulated in the group's account is ring-fenced for its future use and can be requested from the Treasurer.
- Remember that **no u3a member can be paid for services they provide to the group**. This includes giving a talk or demonstration to a group meeting. Legitimate expenses can be claimed from the Treasurer using an Expenses Form which you can print off from our website: Get in Touch > link to Expenses Claim Form.
- Money not immediately paid out as expenditure can be held as petty cash up to £100 after which it must be deposited in the u3a Bank Account and the Treasurer must be notified by email.



Good ideas

- Whether you are required to make a formal account to the Treasurer or not, it is good practice to keep a record (and receipts where appropriate) of any money taken in and paid out for your personal records.
- The attendance register on our website can also serve as a simple ledger for recording money collected in and paid out. You can print this off from the Caves u3a website>Groups>Register.



More information

More information about financial matters can be found in our Finance Policy and Financial Procedures Document on the Caves u3a website at Get in Touch> link to Our Policies and Procedures.