Group Convenors/Leaders Handbook

Category: Interest Groups

Purpose

To provide advice and support to interest Group Convenors/Leaders. This handbook can be used as a template to share with Group Convenors/Leaders, and you may wish to add additional information relevant to your u3a.

Scope

The handbook is based on common practice - please remember that each u3a is operationally independent and specific details should be checked with your Groups Coordinator and/or your committee.

The title 'Group Convenor/Leader' is used throughout this document, however, members who help to set up and run interest groups are known by many names. You might be a Group, Facilitator, Manager or Organiser.

For some of the web links in this document which direct you to the u3a website you may need to set up a log in to access these. This is available to all members.

Introduction to interest groups

Thank you for agreeing to organise an interest group. We are sure you will find it very rewarding, however, it might seem a bit daunting initially. This handbook is intended to provide advice and support with this.

Interest groups are central to u3as, 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.

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, which is defined not by a particular age but by a period in life when full-time employment has ceased.
- Members of a u3a promote the values of lifelong learning and the positive attributes of belonging to a u3a.

- Members of a u3a should do all they can to ensure that everyone who wishes to join a u3a can do so.

The Self-Help Learning principle:

- Members of a u3a form interest groups, covering as wide a range of topics and activities as they desire, by the membership for the membership.
- 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 members of a u3a.

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 guiding principles of the u3a movement.
- No payments are made to individual members for services rendered to any u3a.
- Each u3a is self-funded with membership subscriptions and costs kept as low as possible.
- Outside financial assistance should only be sought if it does not imperil the integrity of the u3a.

The first steps to forming a new group

You may be taking over from an existing Group Convenor/Leader or starting a new group. If you are starting a new group, these are the recommended steps to undertake:

- Agree the development of your group with the Groups Coordinator/u3a committee.
- Liaise with the Groups Coordinator/Treasurer regarding the financing of the group and how this needs to be reported.
- Consider what interest there might be in the subject perhaps by speaking to other members at a monthly meeting or asking for feedback in a newsletter.
- Consider what the aims of the group are – what are you hoping to learn/achieve/share by offering the group?
- Is there an existing Subject Adviser who can support with ideas for the development of the group? There is a list of all Subject Advisers on the u3a website. An alternative could be to contact neighbouring u3as to see if they have a similar subject group and talk to the Group Convenor/Leader. It may also be possible for you to sit in on a group meeting.
- Generate interest by promoting your group using as many different methods as possible. This could include developing publicity in the form of a flyer, poster, promotion via existing groups, via your u3a newsletter, 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.

- You should consider whether there are any risks that might occur as a result of the group's activities. Download the relevant risk assessment checklist(s) to help you identify any and talk to the Groups Coordinator who will advise you on risk assessment procedures. If you're unsure or want further advice to speak with your committee or contact the u3a Office
- Identify what you want to achieve from your first meeting.
- Organise an initial meeting and invite those who have expressed an interest to attend.

The first group meeting

Recommended steps to take at the first meeting:

- Introduce yourself and the purpose of the group as you see it.
- Ask about the skills and experience within the group.
- Agree the tasks that need doing to run the group and who is willing to support these – for example, who is willing to help with developing the programme or keeping the register.
- Agree, if relevant, the level that the group will be aimed at – beginners, improvers, advanced.
- Agree how the group will work – discussion, instruction, presentation etc.
- Agree when and where the group will run.
- Identify any accessibility needs that group members may have. Refer to the Equality, Diversity and Inclusion information on the national u3a website for advice and guidance.
- Agree the costs for running the group and what members will pay. If it is to be funded by your committee agree a budget with them.
- Discuss how group members will communicate with each other bearing in mind data protection guidance (e.g. always using the BCC function on emails to avoid sharing addresses between all members) and always seek permission and agreement.
- Agree some ground rules e.g.
    - Be punctual
    - Listen to each other
    - Allow others to speak
    - Let someone know if you are unable to come
    - 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 what was agreed to your Groups Coordinator to finalise arrangements.

Participative learning and learning styles

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 to your group. Most 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.

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

- **A visiting speaker**: A one-off visiting paid speaker, non-paid tutor or someone from another interest group or u3a.
- **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) decide 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.
- **Research Projects**: These are opportunities to work on short term projects with other u3as or outside organisations. They usually involve some type of research and have a definite outcome.
- **Study days and workshops**: Plan one for your own members or as part of a local network. e.g., family history day, language day, story-telling workshop, debate, quiz, music.
- **Online learning**: e.g., MOOCS (Massive Open Online Courses), some are free on Future Learn.

- **Regional Summer Schools:** Speak to your Regional Team for information about any plans they may have. Many of these are open to any member, not just members within the corresponding region.

Help and support

Resources

- **Subject Advisers** are Trust Volunteers with specialist knowledge in a wide range of topics. Their contact details are available on the u3a website and in the Third Age Matters magazine. Subject Advisers can provide advice on both the setting up of a group of their subject area and the sustainability of ones already in existence, which may benefit from new ideas or a different approach.
- **u3a Subject networks** provide a platform for u3a members to connect and come together around their interests.
- u3a subject surgeries are an opportunity to share resources and ideas, as well as access help setting up a group within your u3a, all members are welcome. These are set up on a case-by-case basis throughout the year and can be found on the u3a website under Learning events.
- **National u3a learning activities and events** showcase a wide range of learning activities online for members to get involved in.
- **Networks, regions and neighbouring u3as** allow you to draw on experience from within the movement. To stay up to date with everything Networks-related, sign up to our News for Network Mailings.
- **u3a website,** in particular the support for u3as section
- **u3a friends newsletter** is a monthly e-newsletter, which can be subscribed to by members and non-u3a members on the u3a website.
- **The u3a office** can be contacted by any member if you have questions, need advice or have concerns. Email: u3a.office@u3a.org.uk or telephone: 020 8466 6139
- **External organisations** such as museums, libraries, schools, universities.

Third Age Trust Workshops

The u3a office and Trust Volunteer Trainers run online workshops to support all members, including 'Interest Group Matters' which covers the information in this handbook and more. The workshops also provide an opportunity to meet other u3a members from across the country. More information about other workshop topics, how to book or request a workshop for your u3a, can be found on the u3a workshops page.

Sharing information

It can be good to share information about your interest group which can be done in several ways:

- On your u3a website

- By setting up a Facebook group or page
- Using your u3a's social media accounts
- In your u3a's newsletter

Policies and procedures

Your committee and/or Groups Coordinator will advise you of the u3a insurance arrangements as well as policies and procedures that you need to be aware of. These will include matters concerning:

- Finance (your u3a may use Beacon to manage finances)
- Data protection (your u3a may use Beacon to store all member information)
- Safeguarding
- Equality, diversity and inclusion
- Accessibility
- Complaints
- Incident reporting

There is also more information about all these areas on the Support for u3as section of the u3a website.

Copyright

A CLA licence allows some materials within limits for educational use within groups. A licence can be purchased from the 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 u3a website for further details.

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 your Groups Coordinator or committee if you are unsure how to resolve the problem or just want someone to explore options with. You can also contact the u3a Office if you want to talk something through or check the information you have.

Issues between group members

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. If you cannot reach a resolution informally 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. The u3a office can be contacted for advice if necessary.

Other issues you may encounter:

- If a member's behaviour is frequently disturbing other members of the group and you feel comfortable dealing with the issue in the first instance, then you can do so. Alternatively, you can seek additional support from your Groups Coordinator.
- If there is a very serious problem in a session, it may be necessary to ask a member to leave for the remainder of the session. If this occurs please contact the Groups Coordinator as soon as possible after the end of the session.
- If a member who is not able to cope independently comes to a meeting without a 'carer', inform the Groups Coordinator as soon as possible to discuss how best to resolve this situation.

Accidents and incidents

If an emergency incident happens during a group, you should call the emergency services as soon as possible. Report all accidents and incidents to your committee as soon as possible and complete an incident form. An Incident Report form template is available on the u3a website. It is important to have an accurate record in case of future problems relating to the incident. For example, if damage is caused to property by a member of the group, take full details, as it may be the subject of an insurance claim. The Third Age Trust provides insurance for group activities, and although personal accident insurance cover is not provided by the Third Age Trust, the insurance does cover all u3a members. Further details (including excess levels) can be found on the u3a website.

For some groups you may consider it necessary to ask members to hold or provide emergency contact details. To request contact details, you need to complete a legitimate interest assessment form available from the u3a website.

Log book

This section of the handbook is for you to develop in whatever way you feel would be most helpful. It could include:

- Statement of the group's aims
- Key contacts
- Registers
- Venue, timing, costs
- Accounts where relevant
- Materials and support available
- Local information

Related documentation

These documents can be accessed on the Support for u3as webpage

- 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

Support, Advice and Information

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

u3a	**Handbook for Group Coordinators** (The Third Age Trust)		
Version	**Description of Changes**	**Date of change**	**Review date**
1.0	Original document	2021	
2.0	Updated information and links	07/02/2023	07/02/2024
3.0	Updated information and links and edited for clarity	28/10/2024	28/10/2026
4.0	u3a principles wording corrected and updated email address for u3a office	19/12/2025	28/10/2026