

Guidelines for Group Leaders

PRESTON PARK



Help and Support

1. About the Group Leader's role or issues with your Group: please contact your **Interest Groups Co-ordinator**.
2. About monies received, banking or expenses: please contact the **Treasurer**.
3. About venue for your meetings: contact your **Interest Groups Co-ordinator**.
4. You can speak to any Committee Member at any time with questions or feedback. You can contact all the above via the **Contact** page on our website (prestonpark.u3asite.uk/contact), where you can also see details of all our current Committee members and other relevant contacts.

Group Start Up Grants

5. A grant of up to £100 may be available to assist with starting up a new Group or buying equipment.
6. A further grant of up to £100 may be available towards venue hire for special events open to all members. Your Interest Groups Co-ordinator can provide further information and help.

u3a Membership

7. Membership of Preston Park u3a (PP u3a) obliges all members to abide by its **Constitution**, our **Member Code of Conduct** and the **Guidelines for Members** which are all on our **website** . Preston Park u3a is a registered charity (no. 1162594), which obliges us to act fairly and with integrity.
8. PP u3a Interest Groups are for PP u3a members only. Non-members are not allowed to join or sign up to a Group until their membership has been processed.

Publicity, Equal Opportunity, Diversity and Inclusion

9. Any event or Group which is open to all members must be first publicised on PP u3a's **website** (prestonpark.u3asite.uk) or in our regular **Updates**. There is a **Groups** webpage with information on all active Groups and potential new Groups are also publicised in our Monthly Updates to members.
10. Our aim is to have a diverse membership representative of the local community and to include everyone who wishes to join and meets our membership criteria. See our **Equality, Diversity and Inclusion Policy**.

Information about your Group on our Public Website

11. Our website - prestonpark.u3asite.uk – is publicly available for members and prospective members to view. On the **Groups** page, if you click on your Group's name you will see your Group has its own webpage. This contains a description of what your Group does, when, how frequently and where it meets, any cost of

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participating in your Group and your name as Group Leader. Photos may illustrate your Group's activities.

12. The website is the main way for members to see what Groups are available and to contact you to enquire about joining your Group. Members can email you by clicking on your name in blue. This brings up a message box which hides your email address. There is also a Group email link which is also your address, or that of the designated main contact if there is more than one Group Leader for that Group.
13. The new website introduced in autumn 2024 also shows whether your Group is:
 - a) Active, open to new members
 - b) Active, not currently accepting new members
 - c) Active, full but can join waiting list or
 - d) Temporarily inactive.

Please note it is our policy that a member applying to join a Group which is full should be put on the Group's waiting list on Beacon (see Beacon Computer System below). In that case the Group should be shown on the website as 'Active, full but can join waiting list'. Logging members on the waiting list ensures that whenever a vacancy arises the place is offered to the member who has been waiting longest. It also enables the Interest Groups Co-ordinators to monitor demand for particular Groups and see when we should seek to set up an additional Group to meet that demand.

14. Please ensure that your Group's webpage remains up to date so members have a clear idea whether they are likely to be able to join your Group straight away or will have to wait for a space to become available. **Contact the Website Manager to make any changes to the website as and when required** and keep your Interest Groups Co-ordinator informed. You can do so via the [Contact](#) page of our website. **NB any updates you make to Beacon do not update the website – you need to contact the Website Manager separately.** Please also send the Website Manager any additional information or photos to enhance your Group's webpage.

Membership of your Group

15. Members of your Group should be entered in the 'Members' page of your Group's record on our Beacon database (see Beacon Computer System below).
16. You may allow members one free "taster" session before they join your Group.
17. If a member asks to join your Group and it is full, please add their name to the waiting list for your Group on Beacon. For further information, please see Beacon Computer System below. When a space becomes available it must be offered to the person who has been waiting longest on this official waiting list. It is our policy to keep waiting lists on Beacon so any space that becomes available in future is offered to the member who has been waiting the longest and we can assess demand for potential additional Groups.
18. If a member misses two consecutive meetings without good reason or offering an apology, you should contact them to check their wellbeing but may, after giving a

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warning, decide they have left your Group. Please also promptly notify the Interest Groups Co-ordinator or any Committee Member (see the [Contact](#) page of our website).

19. In mid-February each year please inspect your Group's membership cards to check if members have renewed their membership for the new year. Please also check your Group's records on Beacon. Members who have not paid their membership subscription for the current year will be shown in red on Beacon. Please prompt them to pay so their membership does not lapse. If they have any queries they should contact the Membership Secretary, whose contact details will be in the renewal notice they received or who can be messaged via the [Membership](#) or [Contact](#) page of our website.

Additional Groups

20. If you are aware there are several members wanting to join your Group, please talk to your Interest Groups Co-ordinator as it may be possible to start a new Group.

Group Activity Fees

21. If you have to pay to hire a venue or a Tutor for your Group, you will need to charge each member a Group activity fee to recoup the costs. The cost of miscellaneous expenses, such as photocopying or equipment hire, should also be shared between the Group's members. See our [Financial Policy](#) for more detail.
22. The Group's activity costs should always be shared equally amongst the Group members for each session of lessons. The venue and Tutor costs will have to be paid no matter how many members attend each class/meeting. Therefore there is no allowance for members' holidays or other absences, so no reduction in your Group's fees should be given for members' non-attendance.
23. You are responsible for calculating the fees members need to pay to cover the Group's costs, informing your Group members when payments become due and reminding them if payments are outstanding.

Venue Hire

24. Your Group may need to hire a venue either regularly or occasionally. Please liaise with your Interest Groups Co-ordinator to set up the hire of a venue for the first time. You can contact them via the [Contact](#) page of our website.
25. Any invoices for venue hire should be sent to you for checking and approval. Please send them promptly with any comments to the Treasurer for payment.
26. You may alter a booking once it has been set up, however you must notify the Treasurer so that the correct amount is subsequently paid.

Paid Tutors

27. A paid Tutor should only be used if a u3a member with appropriate skills and experience cannot be found to tutor the Group. Note that u3a members cannot be paid if they take on a Tutor role, even members of other u3as.

28. Before a paid Tutor starts, they must have returned a completed [Paid Tutor Form](#) (on our website) with tax, National Insurance and professional qualifications information.
29. Please speak to your Interest Groups Co-ordinator if you have any queries.

Booking Courses and Visits

30. There are standard [Booking Conditions](#) on our website, and these will apply to bookings for courses and visits unless a Group has its own conditions approved by the Committee.
31. You can insist on receiving a booking form and payment before accepting a booking and announce a date by when a booking must be made and/or payment received.

Payments for Courses and Visits

32. Where possible members should make payments by bank transfer using:
 - Sort Code - 20-12-75
 - Account Number - 60860212
 - Account Name - PRESTON PK U3A NO2
 - A reference which will enable the Treasurer to identify what the payment is for, e.g. Pilates or Yoga.

NB this is a different account from the one used for members to pay their annual membership subscription. See also [Bank Transfer Payments - Other Costs](#).

33. You can collect members' payments by cheque. Cheques should be payable to 'Preston Park u3a no. 2 Account' with the names of the event and member(s) on the reverse. Send cheques in one batch to the Treasurer with a completed [Treasurer's Interest Group Receipt Form](#) (on the [Links](#) page of our website).
34. You must not accept cash or use your own bank account for PP u3a matters.

Reimbursement for Expenses/Costs

35. If your Group incurs an authorised expense, submit a claim for reimbursement from the Treasurer accompanied by a completed [Expenses Claim Form](#) (on our website).

Refreshments Costs

36. When members meet in your or another member's home, the host may ask them to pay up to £1 to cover minor costs such as tea or coffee and biscuits. You and the host do not need to declare these sums to the Treasurer.

Health and Safety

37. Preston Park u3a aims to provide and maintain safe and healthy conditions for all our members and Groups. Please see our [Health and Safety Policy](#) to help keep yourself and your Group's members safe. This includes responding to accidents/incidents and dealing with emergencies, first aiders, lone volunteering, manual handling and

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evacuation of venues. Contact a Committee member if you have any queries or would like first aid training.

Insurance Cover

38. Preston Park u3a is covered by the third party liability and other insurance provided by The Third Age Trust. Information on our insurance cover is on the [Links](#) page of our website. However, this does **not** cover injury to our members or theft / loss / damage to property. Extreme sports and high hazard activities may also not be covered. Contact a Committee member if you have any queries.

Risk Assessment

39. It is a requirement of u3a's insurers that risk assessments are undertaken for all activities. Risk assessments can be used as evidence in our defence in the case of a claim being made against us by a third party.
40. You need to assess the potential risks, and how you can mitigate them, for your Group's activities. A lot of this is common sense, but it needs to be checked and documented in a written risk assessment.
41. On the [Links](#) page of our website there are **Risk Assessment Checklists** to help in the planning for all types of activities, including those held in a member's home or another venue. You should complete the appropriate form for your Group and its venue, or for each of its venues if you meet in more than one. Your Interest Groups Co-ordinator can help with this. Where you identify a particular risk you should note the actions you will take to reduce the risk. It's important to carry out a risk assessment before the activity takes place, and you can always add to this during the activity.

Accidents, Injuries or Other Incidents

42. Please report promptly to the Chair and your Interest Groups Co-ordinator all accidents, injuries or incidents including damage to any property in your Group. Please record the event in the **Accident/Incident Form** (on the [Links](#) page), and send it to Committee member Jan Howell-Hughes at janhh@hotmail.co.uk within 3 days.

Complaints

43. Complaints or issues that you cannot resolve informally with Group members should be directed towards the Committee, via your Interest Groups Co-ordinator if available. Depending on the nature and source of the complaint, the Committee will make a decision as to how best to approach reaching a resolution. Please refer to our **Complaints Procedure** on the website. If the complaint is of a breach, or suspected breach, of the **Member Code of Conduct** then the **Disciplinary Procedure** will be followed.

Bullying and Harassment

44. Preston Park u3a will not accept any type of bullying or harassment in any of its activities or relationships and recognises that it is the impact of the unacceptable behaviour which is important rather than the intent.

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45. If you have concerns about bullying or harassment within your Group you should:
- Approach the person perceived to be bullying or harassing if you feel able to do so and request the unacceptable behaviour stops. In some circumstances they may not be aware that their behaviour is upsetting to you or another member.
 - Where appropriate, enlist the help of your Interest Groups Co-ordinator or a member of the Committee to assist in approaching them or to speak confidentially to them on your or your Group member's behalf. You can contact them via the [Contact](#) page of our website.
 - Report serious or repeated instances to your Interest Groups Co-ordinator and the Chair. Allegations of bullying or harassment will be dealt with in line with our [Disciplinary Procedure](#) and allegations of discriminatory behaviour or harassment will have regard to our [Equality, Diversity and Inclusion Policy](#). Proven sexual or racial abuse, discrimination, harassment, bullying and dangerous or violent behaviour are examples of gross misconduct which may lead to the perpetrator being given a final warning or being asked to leave the u3a.

Safeguarding

46. If you or a member has a concern relating to the welfare or wellbeing of an adult, please refer to our [Safeguarding Policy and Procedure](#) on the website that explains what to do or who to speak to. It applies to all individuals involved in Preston Park u3a, including the Committee, Group Leaders and to all concerns about the safety and wellbeing of members taking part in u3a activities and in the wider community. See also, if applicable, [South East Region Welfare & Wellbeing Guidelines](#) for u3a members experiencing problems relating to memory or cognitive function

Membership Information and Security (Data Protection)

47. As a registered charity, Preston Park u3a is subject to Data Protection legislation and must keep members' personal information, including addresses and email addresses, private. Our Beacon system is password protected so keeps information securely. Only Group Leaders and Committee members have access to Beacon. Any communications outside Beacon must protect members' personal data unless those members agree they can be shared.
48. If any members change their details including address, phone or mobile number, email address or emergency contact details please notify the [Membership Secretary](#) as soon as possible so they can update Beacon member records. You can contact her via the [Contact](#) page on our website.
49. When emailing your Group, please use Beacon (see Beacon Computer System, below). Any other emails sent to members should be sent BCC (or "blind copy") so that recipients do not see other members' email addresses unless every member of the Group has agreed otherwise.
50. If you keep a separate list of members, you must make sure this information remains confidential and is kept securely. You should comply with PP u3a's [Data Protection Policy](#) and [Privacy Notice](#) (on the [Links](#) page of our website). Members' contact

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information should not be circulated except with the prior consent of the Committee and the members involved.

51. If you hold members' data on a digital device (PC, laptop, tablet etc.), it must be protected by a strong password and that password should not be shared with others. The Beacon system is already protected by a password unique to each user.
52. All members' personal data must be deleted when it is no longer required for u3a purposes. For digital information this should be using secure erasure and for hardcopy documents by burning or shredding.
53. You may use private social media apps such as WhatsApp for your Group to communicate with each other, but please ensure that:
 - You understand private social media platforms are those which allow you to choose who you want to communicate with (which may be more than one person).
 - You will not share members' information in public forums, including public social media platforms.
 - Each member's permission is received before including them on the platform. Verbal permission will suffice, and it is not necessary to retain a record of the permission.
 - Please ensure members' permission is sought before their inclusion in any photographs posted on the platform. It is acceptable to ask anyone who does not want their photo posted on social media or on u3a communications to step out of the photo. This can become the accepted standard where photographs are taken regularly but be careful to warn new members of this.
 - Members understand that bullying or harassment, including unwelcome remarks, is unacceptable on social media as well.
54. Any data breaches should be reported to any member of the Committee within 48 hours of discovery. A data breach can include, but is not limited to:
 - loss of a member's personal data or device or hardcopy containing the data
 - any phishing or spamming originating from your email address using members' personal data
 - unauthorised access to a member's personal data.

Beacon Computer System

55. The Beacon computer system keeps all Group (and most u3a) records and Group Leaders have access to your own Group's information. It is our central database so if, for example, the Membership Secretary records a change in a member's email address or emergency contact details, you will immediately have access to the updated information in your Group's records

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56. Beacon should be used for your Group membership admin and for sending emails wherever possible as it automatically hides the addresses of other members included in your email. Assistance and training in Beacon is available if you need it; please contact your Interest Groups Co-ordinator.
57. Open Beacon with the log in details provided to you, click on 'Groups' in blue type and then on the name of your Group. You might more quickly find your Group by clicking on its initial letter in the blue alphabet above the list, e.g. on Y for Yoga.

Group Details

58. On the 'Details' page of your Group record are your Group's description, venue and meeting details. You should keep these up to date on Beacon. If you make any changes to the Details page, click on 'Save Record' at the bottom of the page. Please let your Interest Groups Co-ordinator and the **Website Manager** know ASAP so they can also update your Group records on our public website. You can email them via the [Contact](#) page of the website (prestonpark.u3asite.uk/contact/).

Adding Members to your Group

59. Add members to your Group on the Group's 'Members' page using the drop down box under 'Add members by name' at the bottom of the page and clicking 'Add' once you have brought up their name.

Emailing your Group Members

60. Email members by ticking the box against their name in the left hand column (or click on 'Select' then 'Select all' at the top of the column) and then scroll down to the bottom of the list of members. Click on 'Do with selected' against 'Send E-mail' and a message box will appear.
61. To exclude anyone on your waiting list from the email, make sure only 'Joined members' is ticked at the top of the list of members and untick the 'Waiting list' box. You can receive a copy of the email you are going to send by ticking the box under the list of who you're sending an email to.
62. Once you have added a subject heading you can personalise the text of your email by typing 'Dear' then, after a space, clicking on #FORENAME from the list on the right. This will pick up each recipient's name when the email is sent.
63. You can add a file from your personal computer as an attachment by clicking 'Choose files'. Please note that if you want to include a hyperlink in your text you must click on the link button – see note on the bottom of the page under your email.

Waiting List

64. The waiting list for your Group if it is full should always be held on the Beacon system.
65. To create a waiting list, tick the 'Enable waiting list' box on the Details page and add the maximum number of members you can accommodate in your Group in the 'Max members' box. Once your Group has reached that maximum number, when you add

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more members on the 'Members' page, the date you added them will appear in the 'Waiting ' column on the right. This indicates they have not yet joined your Group and are waiting for a vacancy. You can see just the members on the waiting list if you tick 'Waiting list' and untick 'Joined members'.

66. When a vacancy arises, it must be offered to the member with the earliest date in the 'Waiting' column in your Group's records on its 'Members' page, as they will have been waiting the longest.