Group Leader's Guidance on running a group

Contents

Guiding Principles 3

Necessary 3

Good Practice 3

Beacon 4

Risk Assessment & Insurance 4

Insurance Cover explained 4

Risk Assessment – why it's needed 5

Maintaining a register 5

Financial Considerations 6

Moving to a chargeable venue for the first time 6

Changing any previously approved financial arrangements 7

Accounting for money collected from members 8

Ongoing Management of your Group 10

Inclusivity 10

Members who are supported by carers 10

Participation by Non-Members 11

Your group is "full" ("at maximum capacity") 11

What is "full" or "at maximum capacity" 11

Ongoing Publicity about your Group 12

Any questions? 13

Area Co-ordinators 13

Other important contacts 13

This document is intended for established groups. If you are thinking of starting a brand-new group, it's recommended that you first read. Guidance on Starting a New Group on the Group Leaders' page on the Bristol u3a website.

Guiding Principles

Being a Group Leader is NOT a job. You are a respected and valued volunteer, and Bristol u3a recognises that you will have other commitments beyond running a group. What's written below is designed to make your life easier and are the key things to remember as a leader of a u3a group. *Some items are described in more detail elsewhere in this document:*

Necessary

1. The group's Beacon record must be kept up to date with the names of all group members. This is required so that Bristol u3a can demonstrate good governance to external bodies such as the Charity Commission and our Insurance company if required.
2. A basic Risk Assessment must be completed for all groups and held on file centrally.
3. Finance
    a. Never enter into any financial agreement with a venue without first seeking approval from your local Area Co-ordinator. This applies to changes (e.g. moving to a differently priced room) as well as the first booking.
    b. If you need to collect money from group members, please ensure that you record this on Beacon.
4. Follow the principles in Bristol u3a's Data Protection Guidance for Group Leaders (to be found on the Group Leaders' page of the website.
5. Ensure that the information about your group on the Bristol u3a website is up to date.
6. Ensure that only current members of your group are included in any associated WhatsApp groups. This means that you have to manually remove people when they leave the group.
7. Maintain a register of who attends each group meeting. You'll only need to share this in case of an insurance claim.

Good Practice

1. Name at least one other person to share Group Leader responsibilities with you.
2. All groups should be collaborative.
3. Never ignore any enquiry from a u3a member wishing to join your group – even if it is currently at capacity.
4. If your group is running at capacity, maintain a waiting list and share this regularly with your local Area Co-ordinators (they may be able to get a new sister group started).

Beacon

Access to Beacon can be granted by Judy Parker (beaconaccess@bristolu3a.org.uk).

Contact your local Area Co-ordinator if you are unsure about any aspect of Beacon. They will then either answer your query immediately or advise on the best way to learn how to navigate the system.

It's recommended that you use Beacon for emails to the entire group as it's the simplest way to ensure Data Protection compliancy.

You should also actively use Beacon around September / early October to identify group members who have not renewed their membership.

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Risk Assessment & Insurance

Insurance Cover explained

All u3as which are fully paid-up members of the Third Age Trust have the benefit of the nationally provided public and products liability insurance cover as well as all the other policies detailed in the overview (see Insurance FAQ on the Documents & Policies section of the Bristol u3a website).

In general, public liability insurance is intended to indemnify the insured against compensation, which they become legally liable to pay, following injury or property damage sustained to others as a result of an activity. Legal liability to another person can arise in a number of ways but by far the most common is negligence. Public liability does not cover pure accidents where no legal liability has been established.

Product liability protects the policy holder against claims arising from injury or damage sustained by a product supplied by you due and for which you are held legally liable. The limit of indemnity is £20m for any one claim arising from one incident or a series of incidents with no limit on the amount payable in the aggregate in any one period of insurance.

The policy is set up to protect all u3a members and includes 'member to member' cover so if somebody is injured undertaking a u3a activity and legal liability could be proven against another member, the insurers will deal with it. This means that Group Leaders/Convenors are protected should there be a claim made against them personally for damages following

an incident in their group. If a non-member attends your group as a "taster", they are also covered from an insurance perspective provided that you have collected basic information about them (name, email, telephone, address).

Risk Assessment – why it's needed

Our insurance company has requested that all u3a groups complete a basic Risk Assessment in order to demonstrate that we've thought about what might go wrong and have come up with strategies to avoid problems. It's not a case of "Health and Safety gone mad" - it's about demonstrating externally that we're not a reckless organisation.

Risk Assessment forms are available from Linda Soutter (linda.soutter@btinternet.com) and are tailored to each different kind of group e.g. the questions related for Discussion Groups are different to those related to Physical Activity groups.

Completing the form is not an onerous task, but you're advised to annotate the form with comments to demonstrate that you have actively considered each question. Don't worry, you will not be held liable if something happens that you've not considered.

Maintaining a register

In case of an insurance claim, the first question that our insurers will ask is "Who attended the meeting?". If your group only has a handful of members, you can probably remember who was there and who wasn't. But if you are the Group Leader for a very large group where only a proportion of members attend, a formal register is useful.

It's also useful if your group is "at capacity" and runs a waiting list. A register of attendance can identify regular no-shows enabling you to contact them and respectfully request that they relinquish their place for someone on the waiting list. *Note: never simply remove someone without contacting them first.*

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Financial Considerations

Bristol u3a provides a subsidy of £480 per financial year (April – March) to cover the costs of venue hire. Once approval for funding has been obtained for your group, invoices will be paid directly by the Treasurer. If venue hire costs are more than £480 within a financial year, you will be responsible for collecting the balance from your group's members and reimbursing the Treasurer.

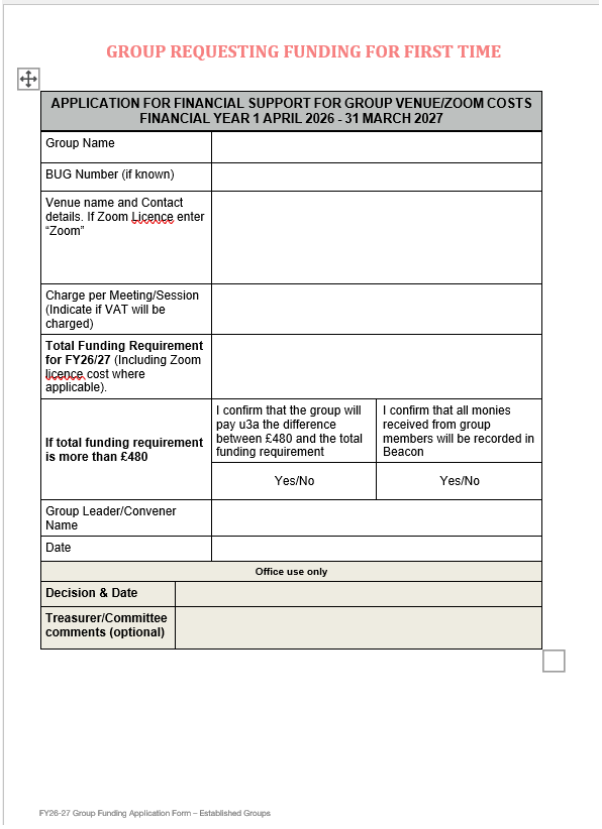
Moving to a chargeable venue for the first time

1. Get in touch with your local Area Co-ordinator as they may be able to recommend a suitable location. You are free to find alternative venues beyond what is suggested. Note that any venue – including the toilets - must be accessible to people with reduced mobility. Group venues should also be close to public transport routes.

2. Once you've found a suitable venue that's available to hire, tell them that you need to **await approval before making a concrete booking**.

3. Collect the following information:
    a. Venue name and postal address
    b. Contact details for the venue's administrator (the person who will issue the invoices):
        i. Name
        ii. Email address
        iii. Telephone number
    c. Room hire details:
        i. Room name
        ii. Hourly rate
        iii. Will VAT be charged on top of the hourly rate quoted?
        iv. Agreed cost for each meeting (the amount that we'll expect to see on ever invoice)

- Complete the form for groups requesting funding for the first time which can be found in the Group Leaders' section of the Bristol u3a website and send it to your Area Co-ordinator for approval. You'll also be allocated a unique "BUG number" which stands for Bristol u3a Group number.



GROUP REQUESTING FUNDING FOR FIRST TIME

APPLICATION FOR FINANCIAL SUPPORT FOR GROUP VENUE/ZOOM COSTS FINANCIAL YEAR 1 APRIL 2026 - 31 MARCH 2027		
Group Name		
BUG Number (if known)		
Venue name and Contact details. If Zoom Licence enter "Zoom"		
Charge per Meeting/Session (Indicate if VAT will be charged)		
Total Funding Requirement for FY26/27 (Including Zoom licence cost where applicable).		
If total funding requirement is more than £480	I confirm that the group will pay u3a the difference between £480 and the total funding requirement	I confirm that all monies received from group members will be recorded in Beacon
	Yes/No	Yes/No
Group Leader/Convener Name		
Date		
Office use only		
Decision & Date		
Treasurer/Committee comments (optional)		

FY26-27 Group Funding Application Form – Established Groups

4. Once you've received approval (this should be within few days), you may contact the venue to confirm your booking. Please impress upon them that the invoice **must** include the following information: "u3a <your group name> BUG <number>" and be sent to treasurer@bristolu3a.org.uk. Any invoice that does not include those specific details may be rejected (or will be significantly delayed). If more than one group meets at the same location and the venue intends to send one aggregate invoice, each group must be represented as a separate line item in the format "u3a <group name> BUG <number>".

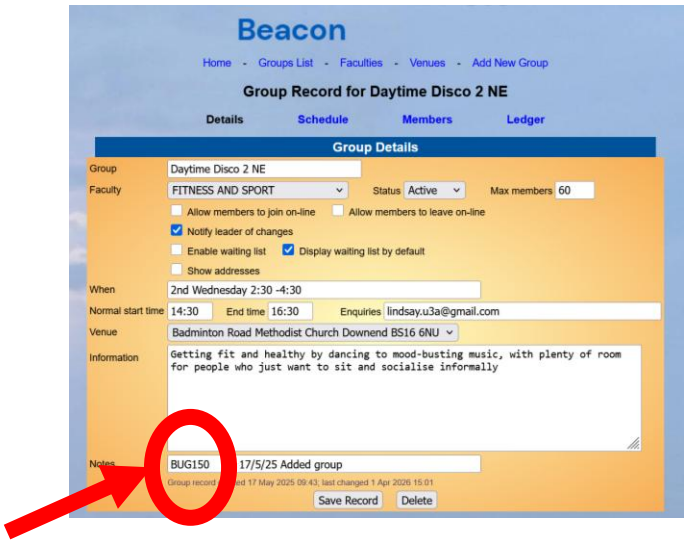
5. Enjoy your group!

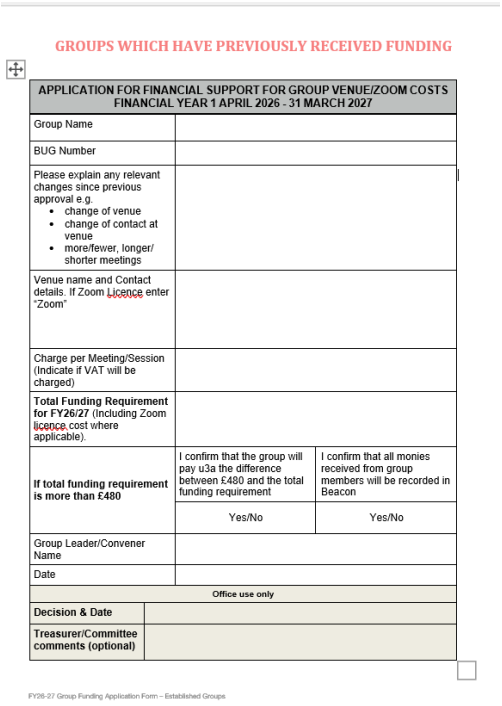
Changing any previously approved financial arrangements

This process is to be used in any circumstances that will change the information that appears on the regular invoice to u3a e.g.

- A complete change of venue
- A change of room within the same venue
- You are changing the duration of the meeting meaning that the invoiced amount will be bigger or smaller than usual

Complete the form for groups which have previously had funding approved (available in the Group Leaders' section of the Bristol u3a website) and send it to your Area Co-ordinator for approval BEFORE committing the change to the venue. You'll find the BUG number for your group in the "Group details" section of your group's record on Beacon (see below).





GROUPS WHICH HAVE PREVIOUSLY RECEIVED FUNDING

APPLICATION FOR FINANCIAL SUPPORT FOR GROUP VENUE/ZOOM COSTS FINANCIAL YEAR 1 APRIL 2026 - 31 MARCH 2027		
Group Name		
BUG Number		
Please explain any relevant changes since previous approval e.g. • change of venue • change of contact at venue • more/fewer, longer/ shorter meetings		
Venue name and Contact details. If Zoom Licence enter "Zoom"		
Charge per Meeting/Session (Indicate if VAT will be charged)		
Total Funding Requirement for FY26/27 (including Zoom licence cost where applicable).		
If total funding requirement is more than £480	I confirm that the group will pay u3a the difference between £480 and the total funding requirement	I confirm that all monies received from group members will be recorded in Beacon
	Yes/No	Yes/No
Group Leader/Convener Name		
Date		
Office use only		
Decision & Date		
Treasurer/Committee comments (optional)		

FY26-27 Group Funding Application Form – Established Groups

Once you've received approval (this should be within few days), you may contact the venue to confirm your booking. Please impress upon them that the invoice **must** include the following information: "u3a <your group name> BUG <number>" and be sent to treasurer@bristolu3a.org.uk. Any invoice that does not include those specific details may be rejected (or will be significantly delayed). If more than one group meets at the same location and the venue intends to send one aggregate invoice, each group must be represented as a separate line item in the format "u3a <group name> BUG <number>".

Accounting for money collected from members

This process MUST be used in the following circumstances:

1. Whenever venue hire fees for a group exceed the approved subsidy in a financial year (April – March) and the group has to reimburse the treasurer for the invoiced excess.

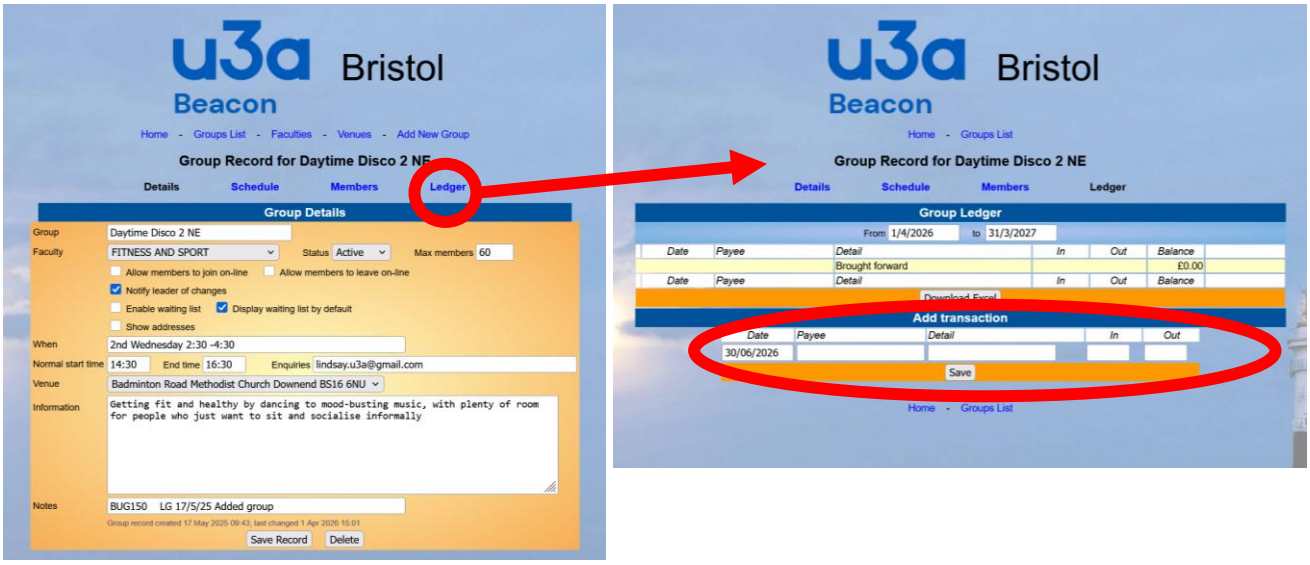
2. Whenever a group leader is collecting money from group members for any future significant expense associated with a u3a activity. Examples may include: group travel, theatre tickets, a future restaurant meal or anything else where someone is receiving money in good faith from fellow u3a members for a future event.

Some groups have an established process where members pay pennies each meeting to directly reimburse another group member who has provided refreshments or for example, photocopies. It is NOT necessary record these payments in the Beacon ledger.

You'll find the ledger for your group on your group's Beacon record (see screenshot below). Once you're on the ledger page, it's simply a matter of entering the "ins" (money received from group members) and the "outs" (money paid to the Bristol u3a bank account or to a theatre for example, for tickets). It's up to you how granular you make this e.g. you can record money received from each member individually or you can aggregate all money received for a single purpose from the group.

If you are collecting money in good faith from members for a future expense, you are advised to ask the Treasurer to set up a "ring fenced" account for your group. This will enable you to transfer money to the u3a bank account instead of holding the money in your personal account. The ledger process and a "ring fenced" account for your group will enable you to demonstrate good accounting and avoid any potential future "misunderstandings".

The process is explained in detail in the Group Leaders' section of the website under the heading "Using the Beacon Group Ledger" click here.



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Ongoing Management of your Group

Inclusivity

Bristol u3a is an inclusive organisation, but what exactly does that mean? Group Leaders are strongly advised to read our Equality, Diversity and Inclusion policy but here are some practical tips:

These are the **only grounds** for not allowing a member to join your group (or remain in a group):

- When you are running a group that requires a certain level of proficiency (e.g. a language group), and the member does not meet that level
- The group is already at capacity *(see elsewhere in this document)*
- When they are disruptive to the group by attempting to dominate, intimidate, or infringe on the protected characteristic of an individual (two warnings should be given). *See the Equality, Diversity and Inclusion policy for a full explanation of protected characteristics.*
- When they take a dismissive or sneering attitude to others (two warnings should be given)

You cannot exclude someone simply because you do not feel that they would be a good fit from a personality point of view. It follows that you should never interview a prospective member unless it is to assess proficiency levels.

If your venue has physical limitations that excludes potential new members (e.g. steps or ambient noise levels), you should consider changing venue. This becomes *MUST change venue* if someone applies to join the group but then finds that the venue is unsuitable e.g. when onsite loos prove inaccessible.

Members who are supported by carers

Sometimes Group Leaders receive enquiries on behalf of people who need the support of a carer. In this case, Group Leaders are advised to understand what level of care the individual needs and to have an open discussion with the enquirer about whether the group would be a good fit for their client. If the conclusion is "yes", then the carer (or the company they represent) should be reminded that they remain fully responsible for their client while the individual is participating in the group.

Participation by Non-Members

Our website allows non-members to make enquiries about groups so sometimes a non-member will ask to join a meeting as a "taster" before signing up to u3a membership. This is allowed at the complete discretion of the Group Leader.

You are encouraged to collect their full contact details (name, address, phone number) for insurance purposes as demonstrates that they have a bona fide intention of joining u3a if the group is what they expected.

If you are hosting the meeting in your own home, you are advised to think carefully before welcoming somebody who is not known to you or another member of the group. It remains your decision.

The principle behind allowing non-members to participate is the assumption that they are genuinely considering joining u3a imminently. While there is no lower age limit to joining u3a, we do not allow children or grandchildren to attend meetings as they are unlikely to become members imminently and are therefore not covered by u3a insurance. This means that if a child causes an accident, it will not be covered by insurance.

Your group is "full" ("at maximum capacity")

If you receive an enquiry and your group is "full" please explain this to the enquirer, making a note of their details, and adding their name to your waiting list (preferably on the Beacon database). Never simply ignore enquiries.

Please also email your Area Co-ordinator to tell them of names added to your waiting list. They will try to get new groups started.

What is "full" or "at maximum capacity"

There are no formal u3a rules that dictate if a group when a group is at maximum capacity as it will depend on the characteristics of the group. For example, the size of a discussion group is limited by how many people will have the opportunity to speak whereas the size of other groups might only be limited by the availability of suitable venues.

Here are some things to bear in mind:

- While u3a members participate in activities at their own risk, remember that Bristol u3a is responsible to ensure that the environment is both suitable and safe.
- If space is the constraint, move to a bigger venue – the Committee will always support any initiative that eliminates a waiting list.

- Stay inclusive and avoid turning people away due to the limitations of your venue – even if you have been meeting there for a long time and current group members like it.
- If your Risk Assessment names a maximum of participants in an event for safety reasons, stick to that number but offer help to the Area Co-ordinator to get additional groups started.

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Ongoing Publicity about your Group

You may publicise your group at any time on the web, e-post, social media (*e.g. the Bristol u3a Members Facebook group*) and in the quarterly newsletter. Some areas of Bristol have their own local newsletter (e.g. East & North East Bristol) so you can also use that for publicity.

Some examples of when some extra publicity is a good idea:

- You have room for new members
- You have news of a special event that's open to all members of Bristol u3a e.g. both Daytime Disco groups open their doors to all members for special Christmas editions of their group meetings
- You have new photographs of a recent visit, group meeting etc (make sure that you get everyone's permission to use their image before you send it for publication)
- Your group page on the website no longer reflects your group accurately

You might also like to publicise group activities in the quarterly magazine *u3a Matters*.

Where to send your information:

- **Website** (your Group's page or the News section) – Gillian Skinner (web@bristolu3a.org.uk) anytime
- **ePost** – Linda Soutter (publicity@bristolu3a.org.uk) by 14th of the month for publication that month
- **E&NE Local Newsletter** – Susan Tappin (fishponds@bristolu3a.org.uk) by 20th of the month for publication that month
- **Quarterly Newsletter** – Joan Gubbin (newsletter@bristolu3a.org.uk)
- **u3a Matters magazine –** Sharon Parsons (editor@u3a-org.uk)

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Any questions?

Contact your local Area Co-ordinator.

Area Co-ordinators

Three Area Co-ordinators cover the whole of the Bristol area.

- **East and North East Bristol groups**: Fishponds, Kingswood, St George, Downend, Easton, Frenchay, Emersons Green, Mangotsfield, Warmley, Longwell Green, Hanham etc.
    - Lindsay Gough & Lyn Hancock negroups@bristolu3a.org.uk

- **West and North West Bristol Groups** – Clifton, Redland, Westbury, Henleaze, Stoke Bishop, Cotham, Bishopston, Horfield, Lockleaze, Filton, Bradley Stoke etc.
    - Rebecca Nelson & Martyn Goss nwgroups@bristolu3a.org.uk

- **South Bristol Groups** - all areas south of the river, Bedminster, Brislington, Knowle, Whitchurch, Stockwood, etc
    - Heather Anne south@bristolu3a.org.uk

Other important contacts

- Languages Specialist Adviser: Hilda Ball hilly.b49@googlemail.com
- Treasurer: Brian Machin treasurer@bristolu3a.org.uk
- Website: Gillian Skinner web@bristolu3a.org.uk
- Beacon access: Judy Parker beaconaccess@bristolu3a.org.uk
- ePost: Linda Soutter publicity@bristolu3a.org.uk
- Newsletter: Joan Gubbin newsletter@bristolu3a.org.uk
- IT Officer: Martin Stubbs u3ait@bristolu3a.org.uk