

# Burton-on-Trent u3a

## Interest Group User Guide

The information in this guide is intended to help you get started and support you in your role.

### Burton u3a Policies

Burton u3a Policies must be read and their contents observed, especially the Data Protection Policy. These can be found on <https://u3asites.org.uk/burton-on-trent/home>

When sending emails use the blind copy (BCC) facility, unless sending via Beacon

### Group Leader Role and Responsibilities

As a group leader you are responsible for organising the running of your Group.

No one person should have to carry the load of running an Interest Group. You may choose to ask other group members to help you with specific functions e.g. organising the programme, take the register, provide refreshments etc.

Do share out the tasks and try and give as many people as possible a job, it gives people a sense of being useful and belonging to a group.

### NEW GROUP

You are not expected to understand everything immediately but the Interest Group Coordinator is available to help with any queries.

Inform the Interest Group Coordinator you plan to start a group. Permission is not needed as long as it is legal and not political or religious (except in the widest sense)

To assess the level of interest, ask Communications to send an email round the membership, the Webmaster to advertise it on the website

Decide on

- Venue – this could be in your home or a hired venue. Liaise with the Interest Group Coordinator to ensure the cost of the venue is acceptable
- Day – the Groups page of the website shows a timetable of groups so you are able to see which are the busiest days
- Time – decide on the hours and frequency of the group
- Equipment – will you need any? The website has a list of equipment held by Burton u3a which can be borrowed. Determine the price of any equipment you might need to buy and submit to the committee on the appropriate form for approval

The Interest Group Coordinator can help with all of these [groups@botu3a.org](mailto:groups@botu3a.org)

### CHANGE OF GROUP LEADER / VENUE / DAY / TIME

Send the change of details to the Interest Group Coordinator [groups@botu3a.org](mailto:groups@botu3a.org) who will inform all other relevant people.

## **RUNNING A GROUP**

### **MEETINGS**

#### **Planning**

Plan the programme for your group, if relevant, after consultation with group members.

Remember the u3a ethos: 'the teachers learn and the learners teach'

What common knowledge is there? How will we organise the group? Who will do what etc?

Include the range, content and nature of the subject to be studied, the timescale etc.

#### **Financial**

It is important the Group Financial Policy is read and observed.

Collect session fee (if applicable) from **everyone** attending the meeting, **including** visitors / non-members

The Group Leader does not pay the session fee.

Refreshments are a private arrangement within a group. These monies can be held by the group and do not go into u3a funds nor do they need reporting on to the Treasurer

Liaise with the Treasurer for the invoice for room hire to be sent directly to him for payment.

Keep a record of group income and expenditure and send this form, along with monies collected, to the Treasurer at the end of each quarter or when requested by the Burton u3a Treasurer

The Group Register can be used to keep a track of income from each meeting as the income should not be less than the total number of attendees less the leader.

#### **Registers**

Keep an attendance register for each meeting. This must include the leader and any non-member / visitor. (At meetings held in May and June, ask to see Membership cards to ensure a person has renewed their membership)

A blank Register can be downloaded from Burton u3a website.

Membership numbers for **all** members must be shown.

If you do not know someone's number this can be found by checking their membership card or by looking at your group's page on Beacon.

For any reciprocal member their home u3a **must** be shown on the register and their membership card checked.

#### **Group Details**

Ensure your group's members list is up to date on Beacon.

Use Beacon to communicate with members of the group as this automatically blind copies members

#### **Outings / Holidays / Lunches**

There are specific guidelines for interest group outings by either coach or car share, and/or holidays and lunches.

The policies are on the website

No visitors / non-members are allowed to attend.

## **ADMINISTRATION**

### **Car share**

Suggest that those having a lift make a donation to the driver

### **Charity fundraising**

Money cannot be raised for a charity as part of / during a meeting, either by a speaker or by a member attending

### **Equipment**

Do NOT use personal or a member's equipment as this will not be covered by u3a insurance.

If a group collectively purchases a piece of equipment e.g. a DVD for the group's use, this becomes the property of the u3a

If the individuals in a group purchase items for their sole use, e.g. a ukulele, that remains their own property

- Existing equipment  
A list of equipment held by Burton u3a is available on the website  
This can be borrowed from the holding group, see website for forms and details
- New Purchase  
Leaders need to submit a request to the committee for approval prior to purchase. A request form can be downloaded from the website
- Equipment unused or broken or damaged  
If any u3a equipment is damaged or no longer used it must be returned to the committee. Contact the Interest Group Coordinator.  
It cannot be destroyed or given away

### **Incident form**

These must always be available and submitted to the Interest Group Coordinator should there be an incident. The form can be downloaded from the website

### **Reciprocal Members**

Burton u3a has an agreement with several local u3as such that members can attend groups without joining Burton u3a but they must pay the session fee (if applicable)

They must have the leader's permission before attending and cannot take priority for places over Burton u3a members

The Terms of the Agreement and the u3a with which we have an agreement is listed on the website

### **Resources / Subject Advisors**

National Subject Advisors exist for many subjects. A list can be found on the national website [u3a.org.uk](http://u3a.org.uk)

The National Office has a Resources library from which DVDs may be borrowed

### **Speakers**

- Outside speakers are discouraged as this is against the u3a ethos. For the occasional speaker who is not a member of any u3a the amount the u3a will contribute has been set by the committee.
- Payments for speakers MUST be requested from the Treasurer.
- The speaker cannot ask for payment to be made to a charity; payment must be made directly to the speaker for them to do with as they wish
- Payment cannot be made to a speaker who is a u3a member. If they are from a different u3a then travelling expenses are allowed.

- Speakers cannot sell their items during a meeting. This must be after a meeting had finished, if at all.
- Gifts cannot be purchased from u3a funds for any speaker

### **Visitors / Non-members**

- Visitors / non-members are allowed 2 taster sessions across all interest groups. After this they must join or cease to attend as the u3a is a MEMBERSHIP ONLY ORGANISATION.
- Visitors / non-members are NOT allowed on any group outings by either car share or coach. If they attend it could compromise the insurance for everyone on the trip.
- If uncertain if the person has been to other groups / activities check with the Secretary, who holds a list of non-members who have attended any activity
- Visitors / non-members should contact the Group Leader before attending for the first time for insurance purposes and to ensure the group is not full

### **Webpage**

Maintain your group's webpage on the Burton u3a website (see How to Maintain Your Webpage)

If you need help please contact the Webmaster [web@botu3a.org](mailto:web@botu3a.org)

### **Waiting Lists**

If the group becomes full or too advanced for new members, please explore the possibility of a new group starting. Inform the Interest Group Coordinator

Review date: August 2025