



Group Leader Handbook (Chester)

Group Name	
Group Leader Contact Details	
Group Leader Deputy Details	
Groups Coordinator	
Venue (Address, date/times, key contact etc)	
Backup Venue	
Meeting Frequency	
Venue Charges	
Owner of Group Accounts	
Assets Held by Group	



Group Leader Handbook (Chester)

Purpose

To provide advice, support and direction to Group Leaders.

To provide an easily shared document to enable uneventful handover of responsibilities when leaders are unavailable or step down.

Scope

To support new and established Group Leaders in their role within the Chester branch of u3a.

Introduction to interest groups

It is good of you to organise/lead an interest group. We are sure you will find it very rewarding. However, it might seem a bit daunting initially. This document is intended to provide advice and support for you to make your venture a success..

It is often said that interest groups are the life blood of the u3a, 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 empowers all the membership.

u3a Principles and Values

- Membership of a u3a is open to all-persons **not** in full time employment.
- Members will promote the value of lifelong learning, the acquisition of new skills and the positive attributes of belonging to u3a.
- Members should do all they can to ensure that people wanting to join u3a can do so.

The Self-Help Learning principle:

- Members form interest groups covering as wide a range of topics and activities as they wish.
- Learning is by the members, for the members.
- 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 learner and teacher. They are all u3a members.

The Mutual Aid principle:

- Each u3a is a mutual aid organisation, operationally independent but a member of the Third Age Trust, so requiring adherence to the philosophy of u3a.



- No payments are made to members for services to any u3a.
- Each u3a group is self-funding with membership subscriptions kept as low as possible.
- Group Leaders will maintain links with the Groups Coordinator and so to the local u3a Committee.
- Group Leaders will be encouraged to maintain lines of communication with group members via Beacon (or equivalent functionality).

Forming a New Group

You may be taking over from an existing Group Leader or starting a new group. Either way you will benefit from following the guidance below.

- 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.
- Should you be starting a new group, first canvas the level of support for the new group within in Chester u3a. Consider speaking to other members at one of the monthly meetings or asking for feedback through the various local publications and or the website.
- Are you clear what the aims of the group are? What are you hoping to deliver by offering a new group to the membership?
- Is there an existing [Subject Adviser](#) (nationally) who can support with ideas for the development of the group? There is a list of Subject Advisers on the [u3a website](#). A list is also published in u3a Matters, the u3a periodical.
- An alternative approach might be to contact neighbouring u3as to see if they have a similar subject group and talking to their Group Leader. It may also be possible for you to sit in on a group meeting.
- Once active, continue to 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.
- You should begin to consider whether there are any risks that might affect the stability of the group or impinge upon members' well-being. Risk assessment forms are available for specific activities, e.g. walks, hosting meetings at home, venue specific assessments. 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 planning 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 keep 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.
 - Being prepared to support monthly u3a meetings es necessary, e.g. managing refreshments within the Events rota.

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

Group Leaders should bear in mind that different people appreciate different ways of learning and to ensure all group members feel suitably involved in the group.

These are some suggestions of how to make your group engaging and exciting by mixing the methods and opportunities for learning – depending on the nature of your group!

- **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 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) allocated an area of research which they bring to the group. This can be a good way to develop new IT skills while learning about the topic under discussion.
- **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.
- **Music.** Develop a programme of performances live or recorded and encourage wider reading/listening to assist group learning. Consider looking for 2–3 novel items of knowledge per performance that can be shared.
- **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 and Shared Learning 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) are free courses 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 in their particular 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.
- [National u3a learning programmes](#) 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.
- [u3a website](#), in particular the support for u3as section
- [u3a newsletter](#) is a monthly e-newsletter, which can be subscribed to on the u3a website.
- [Your Regional Trustee](#) will provide an overview of the region.
- [The u3a office](#) can be contacted by any member if you have questions or 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 runs a number of online workshops to support all Trustees, 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 and how to book can be found on the [u3a workshops page](#).

Sharing information

It can be good to publicise your group. This 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 the u3a newsletter
- At regional, network or local events
- Via your Region/ Nation PR Adviser. If you aren't sure who they are in your Region/Nation, please contact your [Regional Trustee](#).

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
- Data protection
- Safeguarding
- Health and Safety
- Equality, diversity and inclusion
- Accessibility
- Complaints
- Incident reporting

Local policy documents are available on the Chester u3a website within the [Membership Section](#).

There is also more information about all these areas on the [Support for u3as](#) section of the u3a website. (You will need to set up a log in to access this page if you haven't already done so.)

Copyright

A CLA licence allows some materials within limits for educational use within groups. Chester u3a has a CLA licence for group activities. Should you have any doubts, escalate to the Groups Co-ordinator. 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 some 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 national 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 something out.

Issues between group members

While rare, if there is evidence of personal conflict 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 regularly disturbing other members of the group consult the Groups Coordinator for help. If 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 event 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.

Related Documents

All of these documents can be access 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: u3a.office@u3a.org.uk.



APPENDIX – GROUP FINANCE INFORMATION

Group finance information

1. What should I charge my group members for our activities?

- All interest groups should be self-sufficient in funding. Group Leaders are responsible for collecting funds from the members of their group to fund all on-going activities.
- Groups should not be ‘making money’ from their activities, so a review of income may be required if this consistently exceeds expenditure

2. Which bank account should I use to pay in money?

Monies should be paid into the account below. It is not permitted for groups to maintain their own bank accounts.

REF:	Chester u3a
Lloyds	BUSINESS ACCOUNT
Sort code	30-91-92
Account	40638468

Paying-in slips are available from Lloyds bank branches

3. What money can a group leader hold for the group?

- Petty cash should only be held by any group leader as a temporary means of matching funds received from group members with expenditure due to be made in the near future. Typically, this will include money collected by Group Leaders from members to meet the hall rental costs. These funds should be paid into the bank at the earliest opportunity and held by Chester u3a until the appropriate invoice has been received from the hall.
- If money for hall hire is paid on the day of receipt this does not need to be deposited in the bank but records/receipts must be maintained by the Group Leader
- Group Leaders are responsible for ensuring funds are held securely in a locked container and secure location.
- Small amounts of petty cash may be held by Group Leaders to cover the provision of refreshments.

4. How do I arrange hall hire etc?

- Where a group meets in a hall, any contract with the hall must be approved by the Committee and signed by an officer of the Committee
- The Group Leader will agree arrangements with the group members to collect funds to pay the hall fees. Typically, this may be based on an annual membership subscription to cover the total cost of hall fees and refreshments, for example, or may include a regular subscription to the group based on attendance.
- The Group Leader will collect the due funds from the group members and take to the bank for depositing in the U3A bank account. They will pass rental invoices received from the hall to the Treasurer for payment.

5. What if we meet in a house and have no room-hire costs?

- Where groups meet in private houses, the members may agree to cover the costs of refreshments where these are provided. Group Leaders may hold these funds as petty cash

5. What if I want to buy new equipment for my group?

- Group Leaders may submit a request to the Committee for equipment to be purchased for use by groups. An Equipment Request form is available on the Chester U3A website.
- All such equipment purchased remains the property of Chester U3A and may be used by any group as appropriate.
- All claims to be made to the Treasurer on the Chester U3A Member's Expenses form with accompanying receipts. All claims to be authorised by an officer - no-one must authorise their own
- An Asset register is maintained by the Treasurer which records all assets held by Chester U3A, including their initial purchase price, data of purchase and estimated nominal value. It should be noted that under a Receipts and Payments reporting system, all assets are fully written off against Receipts in the year of purchase. The register is reviewed annually.

6. Can I make purchases for the group with my personal credit card then claim the money back?

- Advice from the TAT is that U3As should not make payments using personal payment cards because of the lack of Trustee control in relation to authorising payments. It would also be problematic if a supplier were to go into administration as the debt would be a personal debt against the card holder rather than the U3A.
- It is accepted by the Committee of Chester U3A that in certain circumstances the most practical payment method is for an on-line payment to be made by a group leader using a personal debit or credit card. This will usually be for a software licence where the member operates the supplier account under approval by the Committee.
- The Committee has agreed a maximum £50 limit on payments for purchases on behalf of Chester U3A made by a member without specific prior authorisation.
- Prior approval must be given by the Committee for equipment and other items to be purchased for the use of Chester U3A or particular groups. In these circumstances, it may be appropriate for a member to purchase the equipment themselves and then claim the cost as a personal expense claim. All invoices must be issued in the name of Chester U3A.

7. What if I need to claim expenses via petty cash?

- Refunds of costs which group leaders have necessarily incurred in order to carry out their duties can be paid.
- Claims must be made using the Expense Claim form and be supported by receipts.
- All expenses must be authorised by the treasurer. No-one can authorise their own claim.
- Expenses above £30 must be authorised in advance.
- Chester U3A will reimburse Trustees, co-ordinators and members in the execution of their duly-authorized activities in the following – postage and home printing (B/W 2p/one side, colour 10p/one side).

8. Do I need to submit annual accounts?

- Group financial accounts are required to be submitted annually to the Chester U3A Treasurer for all groups whose annual income exceeds £50. This figure includes all funds collected from members to cover (for example) rental for hall, hire of sports facilities or equipment, refreshments, speaker expenses.
- The accounts should be submitted to the Treasurer in September to cover the reporting period 1 September to 31 August in line with the reporting for the Chester U3A accounts.



- An example Excel spreadsheet for group accounts, Chester U3A Group Finance Template, can be used to guide co-ordinators in what they need to submit annually to the Chester U3A Committee.
- Group co-ordinators can download a copy of the spreadsheet. Those who do not have access to Excel should contact the [Chester U3A Treasurer](#) who can make a Group bespoke version available on-line for editing.
- The information required is:
 - The group name
 - The group co-ordinator, with contact details
 - Dates for the period the accounts cover
 - Opening cash balances held by the group, including that held by the U3A Treasurer (the closing balances are calculated automatically)
 - Details of all income and expenditure for the group
 - Details of amounts transferred to the U3A Treasurer, if appropriate
 - Details of amounts paid by the U3A Treasurer on the Group’s behalf (e.g. for hall rental), if appropriate.
- The spreadsheet can also be used to record the member contact details, including membership number, which is required by Chester U3A. It also provides the facility to record regular income and expenditure to compile the annual accounts. The template has been set up to record weekly meetings, but the dates can be changed at the top to suit the group meetings.
- It must be noted that groups are not allowed to maintain individual bank accounts. Any transactions which require payment by bank transfer must be undertaken by the U3A Treasurer. Likewise, any monies collected by the group co-ordinator must be paid into the correct Lloyds account.

u3a Handbook for Group Leaders – Chester 2026			
Version	Description of Changes	Date of change	Review date
1.0	Modified from National Specimen Document	September 2024	TBC
2.0	Added financial guidance (Appendix)	February 2025	
2.1	Minor Updates	March 2025	
2.2	New references to updated policies	March 2026	