Garforth, Kippax and District U3A

Group Convenor Handbook

Thank you for agreeing to act as a Group Convenor for one of our interest groups.
We want you to enjoy your activities. This handbook is intended to provide information and support for anyone running or involved in the organisation of a group activity in line with Garforth Kippax & District u3a (GK&D u3a) and national u3a policies and objectives.

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Group Convenor responsibilities

The Group Convenor (known as the Convenor from this point) is the person who organises an interest group and is the link between the group's members and the Committee. The Groups Co-ordinator/s are committee members and are you first point of contact with the Committee. We hope the information in this handbook will help with some of the logistics, Health & Safety (H&S), policy or legal issues that can easily be overlooked when we are eager to get on with our activities.

New groups: Getting Started

Any potential new group should be discussed with the Groups Coordinator/s at an early stage. The Groups Coordinator/s can be contacted in person, by email or via the links below and on the GK&D u3a website (under the Contact and Committee tabs).

The Groups Coordinator/s may also direct you to other resources (see the Resources and Support section below). They will solicit initial interest from other members and help with the group set up, including venue advice and identification, Beacon access and training and your first meeting/s. They can also help with venues, start-up costs, publicity etc.

Once there is clear interest in the proposed new group, the Groups Coordinator/s will support you to arrange your initial start-up meeting. At (or perhaps before) this meeting you should;

- Introduce yourself as the Convenor and the purpose of the group as you see it.
- Agree the name of the group, the aim of the group and the level the group is aimed at, e.g. beginner, improvers or advanced.
- Provide a short description of the group that can be added to the website, the Bulletin and Beacon.
- Confirm the date, time and frequency for the group meetings. Please avoid the first Wednesday afternoon of each month (the main members meeting).
- Ask about the skills and experience of those who have expressed interest in the group.
- Agree any tasks that need doing within the group and share them out e.g. keeping a register or collecting any fees to cover costs.
- Identify one or more people to act as Co-Convenors to share the organisation of the group and to cover for absences/holidays.
- Confirm the venue is suitable and practical for purpose. Venues must be risk assessed by the Groups Coordinator/s using the Venue Evaluation Form before use. New Convenors should discuss venues with the Groups Coordinator prior to holding their first meeting
- Arrange a programme for at least the first few meetings and send details of this to the group members and to the Webmaster (for the website), the newsletter editors (for the Bulletin) and the Publicity Officer (for the members only Facebook page).
- Consider any equipment or tools needed for the group. The committee may be able to assist with a small start-up fund. Discuss this with the Groups Coordinator/s.

Running a Group

Convenors and any Co-Convenors should:

- Be familiar with the Activity Checklist/s for the group and review the content at least once a year to ensure that they are suitable for the group activity.
- Make all group members aware of the Activity Checklist/s for the group. Send the Activity Checklist/s, or the link to the checklist/s on the group website page, to new members by email when they join and at least once a year or when changes are made. Provide non-digital members with a paper copy. Carry a copy of the Activity Checklist on all activities.
- Ensure that all group members have current membership of GK&D u3a. This may be membership of GK&D u3a or Associate membership (their primary membership is with another u3a and the person has paid a reduced annual subscription to join GK&D u3a as their second u3a). Membership status can be confirmed by adding the person to your group members list in Beacon. Non-members will not be available to add. They may also be CYGNET (Central Yorkshire Group Network) members (see below for more information about CYGNET members).
- It is expected that Convenors will use Beacon to maintain an up-to-date list of group members. Convenors who are unable to use Beacon should liaise with the Groups Coordinator/s to keep their members list up to date on Beacon. This ensures compliance with our Data Protection Policy and the relevant UK laws and regulations.
- Use Beacon to send emails to their group members. This ensures compliance with our Data Protection Policy and the relevant UK laws and regulations.

- Ensure the group has an effective method of communicating with each other that is in line with GDPR (General Data Protection Regulations). Discuss with the Groups Coordinator if clarification is needed.
- Ensure that, where WhatsApp groups are set up, they only contain current GK&D u3a members. Members who have resigned or who have not renewed their subscription must be removed promptly to comply with GDPR. Membership status can be confirmed in Beacon. Your WhatsApp group members should be cross checked with your Beacon members list in June each year and non-members removed from the WhatsApp group.
- Establish an 'inclusive' communication route for members who may not use current technology. This may be telephone contact, postal contact or a digital buddy.
- Ensure that any ground rules for the activity are followed by members and that members adhere to any group rules with particular regard to safety and respecting others. This ensures that the activity is carried out in a safe way and is that there is compliance with GK&D u3a and national Equality, Diversity and Inclusion policies. Any concerns should be brought to the attention of the committee via the Groups Co-ordinator/s.
- Complete a register for every group activity or meeting. These registers should be kept securely by the Convenor (and handed to the Groups Coordinator/s when groups are closed). Photographs are not an acceptable form of register of attendees at an activity.
- Regularly review any costs (eg room hire, refreshments etc) and charges made to members to ensure that the group is self-financing.
- Have an up-to-date list of emergency contacts available each time the group meets. This should be a printed list, obtained from Beacon, kept in a sealed envelope and accessed only in an emergency. The envelope should be stored securely by the Convenor, Co-Convenor or other person nominated by them to lead a group activity. Do not rely on access to the internet and Beacon for this information, especially in outdoors locations. Visitor* emergency contacts must also be recorded on the day they attend a group activity.
- Check that members have the Convenors contact details.
- Communicate changes to regular or planned meetings promptly to members and, where appropriate, email the changes to our webmaster, publicity officer and bulletin team (see email addresses elsewhere in this document). This is important to prevent poor experiences when potential new members attend regular/advertised group activities that do not take place.
- Prospective new members are welcome and can attend one interest group twice or two different interest groups once and/or one of our monthly meetings before being expected to join us (by completing a membership application form and paying their subscription). Please email the Membership Secretary and Groups Coordinator/s when a prospective new member attends your group to enable checks on how many groups are attended before joining.
- CYGNET members may also attend your meetings. CYGNET members have membership with Leeds, Selby, Sherburn or Tadcaster u3as. Any request to join your group should, ideally, come through the CYGNET liaisons. If a CYGNET member wants to join your group, you must send a CYGNET Member Record Form to the Membership Secretary and our CYGNET liaison. See the CYGNET section on the GK&D u3a website for the form and more information about CYGNET.

*Visitor: any person attending your group meeting or activity who is not in the Beacon database.

If the group activity has a physical element or involves travel to remote areas, members with a smartphone may find it useful to download the following apps: what3words (widely used by Emergency Services) and the Red Cross First Aid app.

Resources and Support

Help and support for Convenors is available from several sources:

- The Groups Co-ordinator/s are here to support you. Contact us if you think we can help you with any aspect of running your group.
- Ask the Groups Coordinator/s to pair you up with a buddy – a Convenor running another group (ideally with similar activities and/or venue/s).
- Contact the Convenor of a similar interest group with one of our CYGNET partners for advice or to share ideas and events. Links to the CYGNET groups can be found here https://garforthkippaxdistrict.u3asite.uk/cygnet/ Please go through our CYGNET Liaison when communicating with other CYGNET groups.
- Explore resources on the national u3a site, which include subject advisors, national learning programme, How To guides, Interest Groups Online, and online learning events. There are links on our website https://garforthkippaxdistrict.u3asite.uk (scroll down to the bottom of the page).

Sharing information about your group

Information about your group can be added to our website, included in our Bulletin, posted on our members only Facebook site and, shared with our CYGNET partners. We can also produce posters and leaflets to advertise your group to both members and non-members.

Email a few paragraphs and pictures of your group's activities each month to our Webmaster, Bulletin editors and Publicity Officer. You can also send details of any planned activities and events, cancellations or changes to your regular programme.

Our website is public so information about your group can be seen by both prospective and existing members. Your group has its own website page on the GK&D u3a website (under the Groups tab).

The Bulletin is sent to all members every month by email (and posted to members who do not have email). Information published in the Bulletin helps to ensure that your group members and all other GK&D u3a members receive information about your group activity and events.

Event reports, details of forthcoming activities, changes and cancellations, can also be posted on our members only Facebook group by Convenors or sent to the publicity email for our Facebook administrator to post on the group.

If you would like to share information about your group activity with our CYGNET partners please do this by emailing our CYGNET Lead. This can be useful for increasing numbers for a specific event.

The email addresses for the Webmaster, Bulletin, Publicity and CYGNET Liaison are listed at the end of this handbook.

Garforth, Kippax & District: Relevant Policies & Forms

Documents and forms for use by Convenors are all available on our website and can be found here https://garforthkippaxdistrict.u3asite.uk/policies-and-accounts/ If you require paper copies the Groups Co-ordinator/s will provide them for you.

All our policies and forms are reviewed from time to time. When any changes occur, you will be notified and a new copy will be available for download from the website or from the Groups Co-ordinator/s on request.

Policies

Our policies are available on our website under the Policy-Reports-Forms section found on the About Us dropdown list. These include policies for compliance with GDPR and others;

- GKD u3a Data Protection Policy.
- GKD u3a Data Protection Guidelines for Members and Convenors.
- GKD u3a Privacy Policy.
- GKD u3a Health and Safety Policy.
- GKD u3a Member Code of Conduct Policy.
- GKD u3a Equality, Diversity, Inclusion Policy.

There are more GK&D u3a policies on our website but this list contains those you need to be familiar with for running an interest group. Please take some time to read them.

Standard forms and documents

These are the relevant forms you need to be familiar with. They are all available via our website or from the Groups Co-ordinator/s:

- Groups Activity Checklist Introduction: Explanation of the Groups Activity Checklist.
- Group Activity Checklist: The specific Activity Checklist/s for your group can be found under your individual group name on the **Groups** tab on our website.
- Session attendance sheet without cash flow: Use as a register of attendees at each activity.
- Session attendance sheet with cash flow: As above for group activities where cash is collected. For smaller groups this sheet can act as a simple financial record.
- CYGNET Member Record Form: Used for recording information about CYGNET members including name, address, their home u3a, any disabilities/needs and their emergency contact details.
- Group Members List: A form to make a paper record of group members (however, please remember that Beacon should always be the primary record of your group members).
- Incident Report Form: Used for recording details of incidents, accidents, injuries and/or damage to property that occur during group activities. Kept for three years in case of a claim being made as a result of the incident.
- Groups Payment to u3a Acct: Instructions for paying money into the u3a bank account where members are paying for activities eg theatre visits and outings/activities.

All the forms/documents can be found at the bottom of the Groups tab on our website https://garforthkippaxdistrict.u3asite.uk/groups/

All group records must be kept securely to comply with the GK&D u3a Privacy and Data Protection Policies.

Incidents and Incident Report Forms

In the event of an accident or emergency, call 999 or 101 (if either is appropriate to the situation) and/or provide first aid if you feel able to. Injured members should not be left alone. Identify one or more group members who will stay with the injured person until professional help arrives or an emergency contact arrives to collect them. Consider abandoning the group activity if appropriate. Call the person's emergency contact.

Any incidents should be discussed with the Groups Coordinator/s as soon as possible.

Complete an **Incident Report Form** as soon as possible. The Incident Report Form is used to record details of incidents, accidents, injuries and/or damage to property that occur during group activities. All Incident forms should **be sent to the Groups Co-ordinator/s** (or other committee member) along with a copy of that meetings Activity Checklist and register, **within 7 days of the date of the incident**. The form is kept for three years in case of a claim being made as a result of the incident.

The incident Report form is available via the Groups tab and under Policies-Reports-Forms on the About Us dropdown list, both on the GK&D u3a website.

Convenors and members with a smartphone may find it useful to download the What3words app (widely used by Emergency Services to locate casualties in outdoor areas) and the Red Cross First Aid app.

Copyright

Garforth, Kippax & District u3a purchase a licence from the u3a Trust that allows some materials to be copied for educational use. There are limitations to these licences. If thinking about using any copyright material (eg printed or online images or audio) please be cautious. Check that any image or audio is licenced for general public use and, where there is any doubt, don't use it!

Further information on these copyright issues is available on the u3a website: https://www.u3a.org.uk/component/edocman/copyright-and-licences-2025/download?Itemid=0

Finance and Insurance

Groups should be self-financing. It may be necessary to impose a charge to cover venue, refreshment or equipment costs. Interest groups should not have their own bank accounts and group monies must not be paid into personal accounts.

- Any petty cash received in the running of the group must be kept in a cash box labelled with "Garforth Kippax & District u3a" and the name of the group. Petty cash held should never exceed £150 for insurance reasons. The total cash held must be declared to the Treasurer by the end of March each year so that the amounts can be included in our accounts.

u3a insurance has a limit of £150 on its cover for the loss of monies and for this reason, groups may only hold cash of up to £150. Any amount over £150 should be paid into the main Garforth, Kippax & District u3a account. This can be brought to the monthly meeting and given to either the Treasurer or a member of the committee at the membership desk if the Treasurer is not available.

Please note: Personal accident insurance **is not** provided by the Third Age Trust.

Group Convenors should liaise with the Treasurer if the group is planning a trip or event with costs in excess of the cash limit. The Treasurer can advise the best way to handle payments from members and to venues. Please see the policy: GKD u3a Groups Payment to U3A account.

Useful email addresses and links

Email addresses
Groups Coordinator/s: groupscoord@garforthkippaxu3a.org.uk
Webmaster: webmaster@garforthkippaxu3a.org.uk
Bulletin: newsletters@garforthkippaxu3a.org.uk
Publicity (and Facebook Admin): publicity@garforthkippaxu3a.org.uk
Membership Secretary: membership@garforthkippaxu3a.org.uk
CYGNET Liaison: cygnet@garforthkippaxu3a.org.uk
Treasurer: treasurer@garforthkippaxu3a.org.uk

Website and other links
GK&D u3a website: https://garforthkippaxdistrict.u3asite.uk
CYGNET: https://garforthkippaxdistrict.u3asite.uk/cygnet/
GK&D u3a Policies, reports, forms: https://garforthkippaxdistrict.u3asite.uk/policies-and-accounts/
Groups: https://garforthkippaxdistrict.u3asite.uk/groups/

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