

## 2023 CHELTENHAM u3a GROUP LEADERS' HANDBOOK

Updated 11 March 2023

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**To start a Group**, decide on an activity you would like to lead, and contact the Groups' Coordinator [groups@cheltenhamu3a.org.uk](mailto:groups@cheltenhamu3a.org.uk) for a chat and some help: It focuses the mind if you can give

1. A name for your Group, with intended activities.
2. Contact details
3. Timings and location for the Group to meet (you probably do not know them at first)
4. Drafting for an advertisement, to go in the Newsletter ([editor@cheltenhamu3a.org.uk](mailto:editor@cheltenhamu3a.org.uk)) and on the Cheltenham u3a website ([webmaster@cheltenhamu3a.org.uk](mailto:webmaster@cheltenhamu3a.org.uk)) and for the next Open Meeting [chair@cheltenhamu3a.org.uk](mailto:chair@cheltenhamu3a.org.uk).

**u3a Support** The Committee if asked will very probably

- Underpin any financial shortfall for the first 6 meetings
- Give a grant to cover reasonable capital items for the group
- Help finding a venue for your meetings

Once a Group is up and running stably, regular group meeting costs such as venue, consumable items (rackets, balls, cards etc), and refreshments are paid by its members. Requests for further one-off costs can be addressed to the Committee.

**Something to think about** You do not need to be the subject expert: You may not necessarily lead all the group meetings: You do not necessarily host the Group. **But**, you are responsible for ensuring that these three roles are fulfilled – perhaps through several members of the group, and that the Group integrates into the general ethos of the Cheltenham u3a <http://www.Cheltenhamu3a.org.uk> .

### **General Data Protection Regulation (GDPR)**

When you are ready to sign up members to your group, you will need to fill a **Permission to publish Group Leader details in Cheltenham u3a Newsletter/Website** and send it to the Groups' Coordinator. *The form is Appendix p10.*

The Groups' Coordinator will enter your Group into the Cheltenham u3a Beacon database and onto the Cheltenham u3a website. The Group details will appear in subsequent Newsletters.

**When the Group becomes active** you may add further details, for the location of meetings, anything specific to a particular meeting, and the name of any other person who is to share duties {e.g. to service email flow, maintain Group contact and information, make financial returns, fill a Group attendance register etc.} The membership secretary [membership@cheltenhamu3a.org.uk](mailto:membership@cheltenhamu3a.org.uk) will enable you to enter your group onto the Cheltenham u3a membership database called Beacon if you are on broadband.

***But if you are not a computer or an email person, all this can be done by phone, post and Newsletter with a little help!***

**Visit the National web site** [www.u3a.org.uk](http://www.u3a.org.uk) - **Members' Area** to find the range of u3a core policies & procedures and the national Resource Centre.

### **To run a Group:**

You will need to give your members a clear idea of what the Group is going to be doing, as well as:

contact details,  
activities & location,  
timings,

and who is going to carry out any admin (emails, financials, register) in the Group.

- Keep your members up to date, including them in your decision making.
- Keep a list of members, applicants and their contact details.

*It is strongly recommended you ask each member for an emergency contact phone number too.*

- It is suggested you use the Cheltenham u3a membership database '**Beacon**', to store lists of Group members, financials, attendance, a calendar for forthcoming events with locations and any information for a particular meeting. *Access is by application to* [membership@cheltenhamu3a.org.uk](mailto:membership@cheltenhamu3a.org.uk) .

**Tutoring in the use of Beacon can be readily given.**

- *It cannot be too strongly emphasised that either the Group Leader or at least one member should be prepared to receive and send emails on the Leader's behalf. That 'email' person needs to be registered as a 2<sup>nd</sup> Group Leader so that their contact details appear alongside the Group Leader's in Newsletter.*
- If your Group becomes too large, consider splitting it, and enabling a new leader.
- If you no longer want to lead the Group, look for a replacement group leader **earlier rather than later**.
- Venues are appended below, which may be updated by Group Leaders through the Beacon database.
- Equipment owned by Cheltenham u3a is appended below, which may be updated by Group Leaders through Beacon.

**Some 'small print':-**

1. The group must be registered with Cheltenham u3a Groups' Coordinator:  
The Group Leader or a nominated support member must keep a list of Group members and preferably a register of attendance (can be done in Beacon).
2. All members of a Group must either be a member of Cheltenham u3a or else attending only one Cheltenham u3a Group, as a free-of-charge Reciprocal member, whilst being a member of another u3a.  
The Group Leader is responsible for checking that members have renewed at the start of the year.  
If the member is from another u3a, that member must produce a current membership from their own u3a, and the Leader will write the Group name on the back (a crude form of policing). Beacon automatically shows which members are currently paid up.
3. If there is cash flow to an external body (e.g. hire of a hall, coach) or regular payments into a kitty for joint Group activity, a quarterly return must be made to the [treasurer@cheltenhamu3a.org.uk](mailto:treasurer@cheltenhamu3a.org.uk) See form next page (input also available through Beacon). The Treasurer will book quarterly venues.  
Otherwise, the Treasurer should be advised that there will be no cash flows.  
This is a formal requirement to comply with the Charity Commissions regulations.
4. Groups may not pay for regular tuition or instruction, but they may hire one off demonstration/teach-ins.
5. Any accident should be reported on the ACCIDENT REPORT FORM (appended) and sent to the Secretary [secretary@cheltenhamu3a.org.uk](mailto:secretary@cheltenhamu3a.org.uk).
6. 'Sorting out problems and grievances' is dealt with in formal ADVICE SHEET 6 (appended)




**Group Quarterly Financial Return (example)**

Date	Payee	Detail	01/01/2016 In	to Out	31/03/2016 Balance
01/01/2016		Brought forward			£25.43
Jan thru Mar	members	contributions	£100.00		£125.43
07/01/2016	Christadolphin hall	3 months charges		£125.00	£0.43
Jan thru March	teas	tea etc.		£13.45	-£13.02
31/03/2016		carried forward			-£13.02

## Group Venues

<i>Name</i>	<i>Contact</i>	<i>Telephone</i>	<i>Accessible</i>
<a href="#">Abbeyfields Community Centre</a>		07471684040	
<a href="#">Badgeworth Village Hall</a>		01452 715034	
<a href="#">Bethesda Methodist Church</a>		01242 269803	Y
<a href="#">Cafe Zest, Cavendish House</a>		01242 521300	
<a href="#">Centenary Hall, Dean Close Junior</a>		01242 267431	
<a href="#">Cheese Rollers Pub</a>		01242 862072	
<a href="#">Cheltenham Bowling Club</a>	bcsecretary@outlook.com	01242 524164	
<a href="#">Cheltenham Croquet Club</a>			
<a href="#">Cheltenham Leisure Centre</a>		01242 528764	
<a href="#">Cheltenham Library</a>		01242 532691	
<a href="#">Christchurch Parish Centre , Christchurch Road</a>		01242 578163	
<a href="#">Community Resource Centre, Grove St</a>		01242 692112	
<a href="#">Cricket Hall - see Cheltenham Leisure Centre</a>			
<a href="#">Education Room, The Wilson</a>		01242 387488	
<a href="#">Everyman</a>		01242 572573	
<a href="#">Friends Meeting House, Warwick Place</a>		07419284515	
<a href="#">Hesters Way Neighbourhood Project</a>		01242 521319	
<a href="#">Highbury Church, Oxford Street</a>		01242 520522	

<a href="#">Holy Apostles, London Road, Charlton Kings</a>		01242 242570	
<a href="#">Honeybourne Gate</a>	Jonathan Stacey	01242 233694	
<a href="#">Isbourne House, Off Oriel Road</a>		01242 254321	
<a href="#">Lewis Carroll Lodge</a>	Andrea Ward	01242 894186	
<a href="#">Lilian Faithful House in Suffolk Square</a>		01242 514319	
<a href="#">Lynworth Hall</a>	<a href="http://www.lynworthhall.co.uk">www.lynworthhall.co.uk</a> Simon Measures	07505-917147 pastorsi@gmail.com	
<a href="#">Neighbourhood Resource Centre</a>		01242 235511	
<a href="#">New Terrain Sandford Park</a>			
<a href="#">Oasis Community Centre, Hesters Way</a>		01242 580022	
<a href="#">Parmoor House</a>		01242 524632	
<a href="#">Pavillion</a>		01242 263344	
<a href="#">Phoenix, St Vincents</a>		01242 511237	
<a href="#">Prestbury Church Hall</a>		01242 239590	
<a href="#">Prestbury Library</a>		01242 234540	
<a href="#">Private Address</a>			
<a href="#">Playhouse</a>		01242 522852	
<a href="#">RAF Association Building 1, Royal Crescent</a>	GL50 3DA	01242 534384	
<a href="#">Richmond Villages</a>		01242 474333	
<a href="#">Rushworth House</a>		01242 237842	
<a href="#">Sacred Hearts Parish Hall</a>		01242 524932	

<a href="#"><u>St Andrews Church Hall Montpellier</u></a>			
<a href="#"><u>St Margaret's Hall and The Annex</u></a>	Clive Taylor	01242 695387	
<a href="#"><u>St Mark's Methodist Church Hall, Gloucester Road</u></a>		01242 583613	
<a href="#"><u>St Matthews</u></a>		01242 519520	
<a href="#"><u>St Philip and St James Parish Church</u></a>		01242 704837	
<a href="#"><u>St Phillips St James</u></a>		07498623855	
<a href="#"><u>Stanton Rooms</u></a>		01242 250087	
<a href="#"><u>Tennis Courts, Montpellier</u></a>			
<a href="#"><u>Uckington Elmstone Hardwicke Village Hall</u></a>		01242 233631	
<a href="#"><u>Unitarian Church Hall</u></a>		01242 255820	
<a href="#"><u>Up Hatherley Library</u></a>		08452305420	
<a href="#"><u>Vitlers Coffee Shop</u></a>		01242 570973	
<a href="#"><u>Wheatsheaf Inn</u></a>		01242 525371	
<a href="#"><u>YMCA</u></a>		01242 524024	



Inventory

Description	Date Purchased	Held by	Buying price	Notes
Roberts Music Centre MP238	8-Nov-07	S Nicholls	209.00	
Personal Address System *	12-Jun-08	A Henshaw	579.79	
Yamaha Digital Piano	16-Aug-08	A Henshaw	195.00	
Folding Display 6-Panel x 4	6-Mar-13	K.Sheather	336.00	
Projector Stand	05-May-12	Robert Joice		
Projector Screen	05-May-12	Nicholas Mann	62.88	
Table Tennis Tables (x3)	16-May-13	Marilyn & David Middleton	992.98	
Casio CDP-120 Portable Digital Piano,stand,&cover	01-Sep-14	C. Mason	350.00	
Italian books & CD's "Mistero in Roma"	01-Dec-14		87.08	
Bass Recorder for Recorder Ensemble Group	30-Aug-16	Rosemary Jenner	205.10	
Bass Recorder for Recorder Ensemble Group x 2	31-May-17	Rosemary Jenner	413.10	
Folding hand truck - Music Hall group	10-Aug-17	Valerie Tomalin	29.98	
6 bags of 8 Boules	27-Jun-18	Nigel Gilhead	124.00	
Mah Jong - Tiles and Racks	19-Jan-19	Christine James	100.00	
Open Day Bunting	10-Jul-21	Janet Ropner	15.99	
Sashes	5-Sep-21	Janet Ropner	17.50	
Epsom Mulimedia Projector EB-U05	15-Nov-21	Robert Joice	380.94	1/2 paid by Historic C
Banner	19-May-22		47.39	
Badges	19-May-22		10.00	
Rope	27-May-22		12.99	

Cable Cover	28-Jun-22	Robert Joice	30.58
Greek Books	5-Jul-22	Steve Orme	66.98

\* PA System Includes:

1 x 350watt amplifier

2 x 15"speakers

2 x speaker stands

1 x SM58 Microphone

2 x speaker leads

**Items for specific use**

Epson WF-511 Printer + 4 Ink Cartridges	31-May-17	Chris Wardle, renewals secretary	176.98
Bridge duplicate boards & green clothes	6-May-14		146.02 1/2 paid by U3A, 1/2
Wine Glasses	4-Jun-14	K.Sheather	109.08 1/2 paid by U3A, 1/2
Monday Bridge Group - Playing Cards	7-Mar-17	Anthony Smith	18.95

**CHELTENHAM U3A ACCIDENT AND ILLNESS REPORT FORM****Please complete and send to the Secretary**

Injury <input type="checkbox"/> or Illness <input type="checkbox"/> (please tick)	
Name of injured/ill person	
Home address	
Contact number	
Group: Group leader's name:	
Venue	
Date	Time
Description of injury / illness	
How injury / illness occurred	
Name of any witness	
Any treatment:	
First aid <input type="checkbox"/>	Professional help called <input type="checkbox"/>
None <input type="checkbox"/>	
Details of treatment (if any)	
Signature of group leader	

GROUP LEADER CONTENT extracted from:-

**ADVICE SHEET 6: SORTING OUT PROBLEMS/GRIEVANCES** available in full on National web site

In any organisation, problems and grievances will occur from time to time and it is important that members know where to turn for help, advice and support, so that whatever the issue, it can be dealt with quickly and objectively and appropriately.

#### PROBLEMS FOR A GROUP LEADER WITHIN AN INTEREST GROUP

Problems can arise within a group e.g.

- Disruptive and/or unsocial behaviour
- Poor attendance/timekeeping
- Unsuitability
- Failure to pay fees
- Disagreement between members

and in most cases the Group Leader will be able to sort it out by talking to the member/members in question and resolving it informally and amicably.

If this fails and the problem persists the Group Leader should refer the matter to the Groups' Coordinator on the committee.

The Group Leader should not allow a situation to continue which impacts on other members of the group.

#### PROBLEMS WITH THE GROUP LEADER

Initially the member/members should try to resolve the problem by discussing it with the Group Leader. However, if this is unsuccessful or if the member/members involved feel unable to do so, the matter should be referred to the Groups' Coordinator.

#### GROUP LEADERS SHOULD NOT HAVE THE AUTHORITY TO EXCLUDE A MEMBER FROM THE GROUP RIGHT OF APPEAL

Before a member is excluded from an interest group or has his/her membership terminated, a right of appeal should be offered.

An appeal, providing it is lodged within a 7 day period, can take the form of written representation for the committee to consider or a request for a right of reply. If it is the latter, a meeting of the whole committee should be called and the member(s) in question should be asked to attend accompanied by a friend/friends who may also speak.

The whole issue should be summarised and then the member(s) given the opportunity to speak, along with the supporter(s) if so desired. In both cases, the committee will review its decision, taking into account any mitigating circumstances, and then make a final decision, which must be communicated in writing.

#### PLEASE REMEMBER THE FOLLOWING

- You must ensure every action you take is documented
- You must deal with problems and grievances quickly and fairly
- You should do all you can to settle the issue without having to resort to formal disciplinary action
- You should maintain confidentiality.

## **Guidelines: Cheltenham u3a Holidays and Visits Policy**

Also available on u3a national website: Advice Sheet 8 - Social Events and Travel

### **Organiser**

- The organiser is responsible for advertising holidays and visits in the newsletter, making bookings, arranging transport and any accommodation and agreeing any travel package with the travel agent/company.
- All financial arrangements and transactions must be overseen by the Treasurer of the committee and any auditors. All contracts must be signed by the Treasurer, or another Trustee.
- If payment is due on the day of a trip a cheque should be requested from the Treasurer, giving 5 working days' notice. A receipt must be obtained from the venue/travel provider and given to the Treasurer
- Cheques from participants on day visits should be made out to the u3a social account. The organiser must neither collect cheques payable to her/himself nor pay associated expenditure with a personal card or cheque, otherwise the transaction would be personal rather than business based. This applies to both visits and holidays. Any refunds from venues must be made payable to the u3a.
- Cancellations: if not made within sufficient time, and there is no possibility of filling the reserved place(s) it may be impossible for the organiser to refund monies paid. However, if the place can be filled, it is possible that some, or all, of the venue cost can be recovered but not the share of the transport. In extreme cases e.g. sudden incapacitating illness or bereavement, a full refund can be made.  
In the case of individual events if no waiting list is held e.g. dances, monies can only be recouped through the member who is cancelling personally finding a substitute. The financial transaction would then be between the two u3a members concerned and not involve the organiser who, however, must be informed of the situation.
- Participants must arrive promptly at any arranged meeting place, particularly at the planned time and venue for the journey home. It is suggested that participants do not explore an area alone and that one of their group has a mobile phone, the number of which is held by the organiser. Similarly, the organiser should provide a mobile contact to the participants. An emergency contact number should also be held, particularly on holidays and with the agreement of each participant, to be used in cases of serious injury or illness.
- Personal costs, incurred by the organiser, such as stationery, telephone calls or postage, should be built into the price. This would also include a remuneration for the driver.
- Organisers have the discretion to accept a free place on a holiday or visit if they consider it reflects the amount of extra service provided to other members. In some instances organisation can take considerable time and effort throughout.

### **Insurance**

- Holidays should be organised through a travel company as there is full coverage through their own liability insurance. It is recommended that holiday payments are paid individually to the company and not to Cheltenham u3a. They can be collected by the organiser and then sent in bulk to the company.
- On holidays and visits care must be taken in making any pre-payments as there is no insurance provided should the supplier go out of business.
- It is the responsibility of each individual u3a member to arrange his/her own personal accident/injury or travel insurance.
- To safeguard the organiser, who could be considered to be the tour operator, the Trust has organised Tour Operator Liability Insurance to provide protection should anything untoward happen.
- Disabled members: the liability insurance provided to all member u3a groups by the Third Age Trust would cover the attendance of a companion/carer. However, the carer involved would, together with the disabled member, pay in full for the holiday or visit. The carer would take responsibility for the disabled member during the holiday or visit. Personal insurance would apply as above.      □





**Cheltenham University of the Third Age**  
Registered Charity No. 299146

### Permission to publish Group Leader details in Cheltenham u3a Newsletter/Website

This is separate and in addition to your membership application. (Form date: 12th May 2018)

Before completing this form read the PRIVACY STATEMENT overleaf.

**If there is to be more than one Leader shown in Newsletter and Website, each will need to fill a form #.**

Fill in below those details you expect to appear in the newsletter and on the web site:

- **#Are you a Group contact?** Yes/no . . .
- **Full name** . . .
- **Name of Group** . . .
- **Meetings timings** . . .

**Newsletter** and **members-only area of Website** and visible to the reader

*Either a Tel No . . .*

which will not be used on the website

*Or else an Email address(s) . . .*

**Website** – area available to general public

A contact Leader needs an **Email address:** . . .

This email address will be used via a dialogue box on the web site, and will not be visible to the recipient until/unless you contact them with an open email address.

(If you have no email, the web site will direct enquiries to the Groups Coordinator who will ring you with any messages.)

... **add your last name adjacent to this box** to validate this form to consent to Cheltenham u3a using the information you have supplied above for legitimate u3a membership purposes

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**Beacon** is the name of the database on which all Cheltenham u3a members details are held. It can be made available to Group leaders to *record any or all of:-*

- Groups members, which then allows simultaneous sending of emails
- hold general information and specific meetings details
- keep finance records for venues
- hold venue and activity timings
- hold information on max numbers and waiting list.

... **add your last name adjacent to this box** if you would like to be *introduced* to using Beacon. (Highly recommended, and does not commit you to later use.) See privacy statement overleaf if you do not intend to use Beacon\*\*

**Return this page to the Groups' Coordinator, [groups@cheltenhamu3a.org.uk](mailto:groups@cheltenhamu3a.org.uk)** preferably as an attachment to an email (it is recommended you ask for a read receipt)

■

## PRIVACY STATEMENT

**Submitting this form gives your consent to Cheltenham u3a to use the information you have supplied for legitimate u3a membership purposes, including:**

- Contacting you on u3a Group business
- Sending the details supplied by you above to the Newsletter printer and distributor for publication and delivery to Cheltenham u3a members
- Publishing your Group details as supplied by you on the Cheltenham u3a web site

Your data will be held securely and used only for Cheltenham u3a Group purposes in accordance with Data Protection Regulations. You are advised to read our Privacy Policy for more detail.

If you don't wish to be contacted via email and/or phone, then please don't supply these details, however, you must provide your postal address and either an email address or else a phone number.

You can request to see what data we hold for you, to have email and/or phone number(s) deleted, or to withdraw your consent at any time by contacting the Groups' Coordinator.

**\*\*It is a Group Leader's responsibility** to maintain a list of members in their group in a form that enables contact **but does not expose details between members**, and to ensure that members understand their information is covered under the required GDPR. The same rules apply to any other member of the Group given access to member information.

The list of group members should be entered on the Beacon data base or else supplied to the Groups' Coordinator to do so. It is of course recommended that the group leader (or their appointee) take tuition in Beacon.

**This applies to any member of the group who will access group members' details.**



## Beacon

In the body of the handbook, under 'To Run a Group' is the bullet point:

- It is suggested you use Beacon, which can store lists of members' details, financials, attendance, a calendar for forthcoming events with locations and any information for a particular meeting.

Beacon is an online system for managing local u3as. It holds our membership database and manages subscriptions and renewals. It provides facilities for managing Groups and for managing our finances. Some information taken from Beacon does appear on the Cheltenham u3a website, which is the website you will find during a normal internet search. That information is only the tip of the iceberg, the rest is restricted. Committee members have full access. Group Leaders can be given access to facilities for managing their group. Access is through a user name and password. These are issued to the Group Leader by the Cheltenham u3a Beacon Administrator

[beacon@cheltenhamu3a.org.uk](mailto:beacon@cheltenhamu3a.org.uk)

Beacon's web address is: [www.u3abeacon.org.uk](http://www.u3abeacon.org.uk), this will bring up the log-in page.

To make full use of the software, Group Leaders need to know the Cheltenham u3a membership numbers of their group.

While its use is not compulsory, it is a very useful tool for Group Leaders. The attractions include:

- Foolproof GDPR compliant email facilities
- Printing address labels for your group
- Load up events into the calendar
- Succession planning, easy passing-on of the Group Leader role, to your successor.
- Not having to ask every year for confirmation of their u3a membership renewal (and with it u3a top up cover) you can see who is a current member
- Beacon is the home of the on line ledger form that appears in the handbook
- Editing the data about your Group e.g. its meeting venue using the template below

Transport	
Faculty	<input type="text"/> <span style="margin-left: 100px;">Status <input type="text" value="Active"/></span> <span style="margin-left: 50px;">Max members <input type="text" value="10"/></span>
	<input type="checkbox"/> Allow members to join on-line <input checked="" type="checkbox"/> Enable waiting list <input checked="" type="checkbox"/> Notify leader of changes
When	<input type="text" value="First Monday morning"/>
Normal start time	<input type="text" value="10:00"/> <span style="margin-left: 20px;">End time <input type="text" value="12:00"/></span> <span style="margin-left: 20px;">Contact <input type="text" value="01242 123456"/></span>
Venue	<input type="text" value="Everyman"/>
Information	<div style="border: 1px solid gray; padding: 5px;"> <p>The group meets once a month in the upstairs bar, to discuss the latest developments in transportation and often addresses members ideas about the best way to avoid Boots corner.</p> </div>
Notes	<input type="text"/>
Group record created 11 Dec 2017 09:56; last changed 11 Dec 2017 09:56	