

# Cheltenham u3a

We learn, laugh and live because we exist for members by members.

## GROUP LEADERS' GUIDEBOOK

### Contents

Principles of the u3a movement	2
Why and how to start a Group	3
Help available from the Third Age Trust	6
The Clusters	7
GDPR form and privacy statement	9
Beacon for Group Leaders	11
Finance guidance for Group Leaders	17
Quarterly finance report form	18
Group venues	19
Incident report form	21
Grant application form	22
Risk Assessments	23

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## PRINCIPLES OF THE U3A MOVEMENT

The U3A Movement is non-religious and non-political and has three main principles:

### The Third Age Principles

- Membership of a U3A is open to all in their third age, which is defined not by a particular age but by a period in life in which full-time employment has ceased.
- Members promote the value of lifelong learning and the positive attributes of belonging to a U3A
- Members should do all they can to ensure that people wanting to join a U3A can do so.

### The Self-help Learning Principle

- Members form interest groups covering as wide a range of topics and activities as they desire; 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 the learners and the teachers; 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, which requires adherence to the guiding principles of the U3A movement.
- No payments are made to members for services rendered to any U3A.
- Each U3A is self-funded with membership subscriptions and costs kept as low as possible.
- Outside financial assistance should only be sought if it does not imperil the integrity of the U3A movement

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## WHY WOULD ANYBODY WANT TO START A NEW u3a INTEREST GROUP?

- It's fun and enriching in so many ways. You will get in touch with people who share your interest(s), creating an opportunity for new friendships, enriching social interaction and keeping your brain fit, happy and healthy.
- You do not need to be an expert!
- You would like to learn and explore something new with others who are equally interested but also don't know much about the subject.
- You may have a special interest or skill you would like to share with others.
- You would like to share an activity, like a sport, game or walks with others.
- A group you want to join is full.
- Help is available - as much or as little as you want

## HOW DO I START A NEW GROUP?

### First steps

1. **Choose** a name for your group.

2. **Decide:**

- What you're going to do in your new group.
- How/where/when you're going to meet.
- Whether you want to limit the size of the group or not. This may depend on whether you'll get together at a private address or in a public space.

3. **Write** some words (about 50 - 100 will do nicely) to tell the membership about your exciting/friendly//sociable/brainy/relaxing/active new group.

- Add your contact details (tel. no. or email address) which you want to appear in The Magazine and on the members' only area of the Website.
- **Ask members to state their membership numbers if they reply.**

4. If you need help at this stage, contact our Cluster Administrator at [clusteradmin@chletenhamu3a.org.uk](mailto:clusteradmin@chletenhamu3a.org.uk) (see p7)

5. **If you don't have any questions, let these three people know** about your plans and send your words to them via email:

- The Cluster Administrator: will put you in touch with your Cluster Supporter.  
[clusteradmin@chletenhamu3a.org.uk](mailto:clusteradmin@chletenhamu3a.org.uk) (Please see p7)
- **The Magazine editor** [editor@chletenhamu3a.org.uk](mailto:editor@chletenhamu3a.org.uk) who will publish your words in the next Magazine

- **The Web Manager** [webmanager@cheltenhamu3a.org.uk](mailto:webmanager@cheltenhamu3a.org.uk) who will more or less immediately publish your words on the website.

#### 6. Sit back and:

- Wait for people to contact you, and start a group list with the names and contact details of people who contact you, preferably in Beacon because it will make life easier for you and our administration. But you're not familiar with Beacon don't hold back. As the wise people say, one thing at a time.
- Make enquiries about possible meeting venues if you plan not to meet in a private home. (A list of venues is attached - see the Contents Page)

#### Next steps

When you are happy that you have enough members for the new group, and have their contact details, let your **Cluster Support** (FS) know.

Your FS will ask you to **fill out a form** giving our u3a permission to publish your contact details (a phone number or email) for members to contact you.

Read the valuable notes for Group Leaders in the Group Leaders' Handbook. Your FS will give you a link to this.

If there are no further questions your **Cluster Supporter** will inform the web manager and The Magazine editor that your group is up and running and it will be added to the Groups List on the website, in The Magazine and on Beacon.

#### Final Steps

Let everyone who expressed an interest know **when and where** your first meeting will be. This can be done via **Beacon (instructions on p ,** but if you're not familiar with Beacon you can use your own email, but please ensure that you put all addresses in the BCC field so that your members' addresses are not visible to each other **until you have their permission to share everybody's emails.**

*You're up and running! Enjoy!*

#### SOME SUGGESTIONS THAT MAY MAKE YOUR LIFE AS A GROUP LEADER EASIER

##### You do not need to do everything! Ask your members to help run your group!

- You do not need to be the subject expert.
- You may but do not have to lead all the group meetings.
- You do not necessarily have to host the Group.
- You do not have to do all the administration.

However, you are responsible for ensuring that all these things happen.

##### Where should or could my Group meet if not in a private home?

There is an extensive list with contact numbers on our Cheltenham u3a website:  
[https://cheltenham.u3asite.uk/groups/?sort=venue#list\\_button\\_anchor](https://cheltenham.u3asite.uk/groups/?sort=venue#list_button_anchor)

You may of course host your group at your home or the homes of your group's members. Many groups take turns hosting their group.

### What about start-up costs?

You may apply to the committee for help e.g. paying for room hire for your first meeting.

Once a Group is up and running, regular group meeting costs such as venue, consumable items (rackets, balls, cards etc), and refreshments are paid for by its members.

Requests for further one-off costs can be addressed to the treasurer.

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

### Beacon, your second-best friend

Extensive and up to date (2026) instructions - **with screenshots** - on how to use Beacon to make your life as a group leader easier can be found here:

<https://www.u3a.org.uk/what-we-do/learning/interest-groups-online/igo-help-and-information/beacon-for-group-leaders>

### Quite important

- Your group must be registered with your **Cluster Supporter**
- You or a nominated support member must keep a list of Group members (this can be done in Beacon).
- All members of a Group must either be a member of Cheltenham u3a or, if a paid-up member of another u3a, may attend **one** Cheltenham u3a Group, as a free-of-charge Reciprocal Member,
- Non-members may attend one group session as a trial.
- The Group Leader is responsible for checking, in Beacon, that members have renewed at the start of the year.
- If there is cash flow to an external body (e.g. hire of a hall or coach) or regular payments into a kitty for joint Group activities, a **Quarterly Return** must be completed and sent to the [treasurer@cheltenhamu3a.org.uk](mailto:treasurer@cheltenhamu3a.org.uk). **This is a formal requirement to comply with the Charity Commission's regulations.** The form for your quarterly return is on **page** or you can do this on Beacon, making life for you and the Treasurer easier.

### Paying for tuition

Groups are discouraged to pay for regular tuition or instruction. We are a self-help organisation, and **we exist for members and by members.**

### Accidents and Illness

Any accident or illness must be reported on the ACCIDENT REPORT FORM (**appended**) and sent to the Business Secretary: [businesssecretary@cheltenhamu3a.org.uk](mailto:businesssecretary@cheltenhamu3a.org.uk)

### Last but essential:

**I have questions, and they haven't been answered above.**

Your **Group Support** is there to help you Contact him/her at: **address to follow**

***Enthusiasm is catching and you will have all the help you need.***

**YOU CAN DOWNLOAD MORE ADVICE HERE:**

<https://www.u3a.org.uk/brand-guidelines/handbook-for-group-convenors-leaders>

## HELP IS ALSO AVAILABLE FROM THE u3a TRUST aka The Third Age Trust (TAT):

<https://www.u3a.org.uk/members-area/support>



### Advice & Guidance

Our document library is full of support, guidance and the legal documentation you'll need to run your u3a.

#### NEW

Insurance Cover Note 2026

Copyright Licence Application (CLA) form for 2025-2026



### Workshops & Training

We run online workshops to provide training, support and information for u3a members.

They provide a great opportunity to learn, meet and exchange ideas with other u3a members, from topics covering how to run a u3a and being a committee member to interest groups, finance, contingency planning and more.



### u3a Networks

Networks are informal groupings of u3as usually local to each other.

Representatives from each u3a meet to share ideas, events, speakers, and training sessions, to discuss issues and to support each other.



### Grants

Each year The Third Age Trust makes available a number of different types of grants to enable u3as, and networks of u3as, to raise awareness of the u3a movement and encourage the recruitment of new members.



### Beacon

Beacon is our easy to use membership database available for u3as to enable them to quickly and efficiently manage members, groups and finances. It has been specially developed to help reduce the workload of u3a committees.



### Brand Guidelines

The Brand Guidelines feature branding and publicity tools (images, leaflet templates and logos) and merchandise (caps, rucksacks and diaries) that u3as can use to promote the movement and attract new members. This page also links to our new u3a Brand Shop.

# Cheltenham u3a

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## The 5 CLUSTERS, THE CLUSTER ADMINISTRATOR AND SUPPORTERS

**ADMINISTRATOR: RICHARD STEPHENSON**

CLUSTER SUPPORT	LYNNE MACEDO	SHEILA TOMKINS	KEN SHEATHER	JON PEARSON	JILL HETHERINGTON
	<b>ART AND SPECIALIST</b>	<b>BOOKS AND MUSIC</b>	<b>GAMES, SCIENCE AND DISCUSSION</b>	<b>ACTIVE/SPORTS GROUPS</b>	<b>LANGUAGES AND SOCIAL</b>
1.	Art 1	Book Group 1	Bridge – Duplicate	American Square Dancing for Beginners	Ancient Greek
2.	Art Appreciation 1	Book Club 2	Bridge - Mini Bridge	English Country Dancing	Chinese Language and Culture
3.	Art Appreciation 2	Book Group 3	Bridge Bidding - Course	Scottish Country Dancing	French Book Group
4.	Painting for Pleasure	Book Group 4	Bridge – Social	Caravans and Motor Homes	French Level 1 Conversation
5.	Sewing Group 1	Book Group 7	Bridge 2 Duplicate	Cooking	French Conversation 1
6.	Sewing Group 2	Book Group 25	Bridge Intermediate Duplicate	Garden Visits	French Conversation 2
7.	Sketch Club	Book Cover Design	Canasta	Third Age Motorcyclists	French Discussion
8.	Drama Tuesday	Classic Novels	The Check Mates (Chess)	Coby's Day Trips	French Enthusiasts
9.	Drama Wednesday	Crime Fiction	Cryptic Crossword Compiling	Badminton 1	French Intermediate 1
10.	Film Group 1	Great Books!	Cryptic Crossword Solvers	Badminton 2	German Conversation
11.	Film Group 2	India and SE Asia Books	Jigsaw Lending Library (Free)	Boules	Greek Intermediate
12. 13.	Shakespeare 1	Irish Fiction	u3a Pub Quiz Teams	Croquet	Italian Reading
14.	Shakespeare Live	Literature and Society	How it Works Visits (HIW 1)	Kayaking	Italian Second Year
15.	Family History	Modern Biography	How it Works Visits (HIW 2)	Pickleball 1	Italiano II Terzo Anno

16.	Genealogy A	Poetry Appreciation	Science and Technology 1	Pickleball 2	Language and Languages
17.	Genealogy B	Poetry Reading	Science and Technology 2	Pickleball 3	Latin 1
18.	Genetic Genealogy	Poetry to Share	Current Affairs	Pickleball Beginners	Latin Improvers
19.	Historic Churches	The Orangery Book Group	Current Affairs 2	Short Tennis	Russian Improvers
20.	History 19 <sup>th</sup> Century	Backbeats – Rock/Pop Band	Current Affairs 3	Skittles	Spanish Advanced
21.	Local History	Choir	Current Affairs 4	Summertime Boules	Spanish Beginners
22.	Military History	Folk Band	Economic Theory	Table Tennis 1 Intermediate	Welsh Conversation
23.	Modern History	Handbell Ringing	Let's Discuss at No 1	Table Tennis 2	Friday Lunch Club 1
24.	Russian History	Jazz Appreciation	Let's Discuss at No 2	Table Tennis 3	Friday Lunch Club 2
25.	DSLR Photography	Jazz-Swing Band Session	Philosophy 2	Walking Football	Friday Lunch Club 3
26.	Flower Arranging	Keeping Music Hall Alive	Philosophy 3	Ambling	Friday Lunch Club 4
27.	Model Railways	Music Forum	Wine Appreciation	Longer Walks	Happy Eating
28.	Monday Writers	Rock Rebus Session	Eastern Philosophy	Short Walks	Lunch Club
29.	Poetry Writing Workshop	Recorder Consort		Urban Walks	MOTO- (Members on Their Own)
30.	Writing Development	Recorder Ensemble		Walks 1	Out for Lunch
31.	Writing for Pleasure	Ukelele Improvers		Walks 2	
32.	Travel	Understanding Music		Walks 3	
33.				Tai Chi	
34.				Tai Chi - Yang Long Form	

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## GROUP LEADERS: PERMISSION TO PUBLISH YOUR DETAILS IN THE THE MAGAZINE AND ON THE WEBSITE

*Before completing this form, please read the PRIVACY STATEMENT on the next page.*

*If there is to be more than one Leader shown in The Magazine and on the Website, each will need to fill in a form.*

### FILL IN BELOW THOSE DETAILS YOU EXPECT TO APPEAR IN THE NEWSLETTER AND ON THE WEBSITE:

- Are you a Group **Leader** or **Contact**?

---

- Full name \_\_\_\_\_

- Name of your Group \_\_\_\_\_

- Meetings: days and times

---

### CONTACT INFORMATION

*This information will be used for **The Magazine and members-only area of the Website**. This information will not be available to the public.*

**Either** a telephone number **or** email address:

---

*Only your **name**, as the leader of your Group, will be visible to the public **on the public area of the website**. Your name will be clickable, and **via a dialogue box** a prospective member will be able to contact you. Your email 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.*

**I hereby declare that I am familiar with the content of the Group Leaders' Handbook and** consent to Cheltenham u3a using the information I have supplied above for legitimate u3a membership purposes.

Signature \_\_\_\_\_

Date \_\_\_\_\_

**Please read the Privacy statement on the next page.**

## **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) learns how to use Beacon.

The above applies to any member of the group who will access group members' details.

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## BEACON FOR GROUP LEADERS

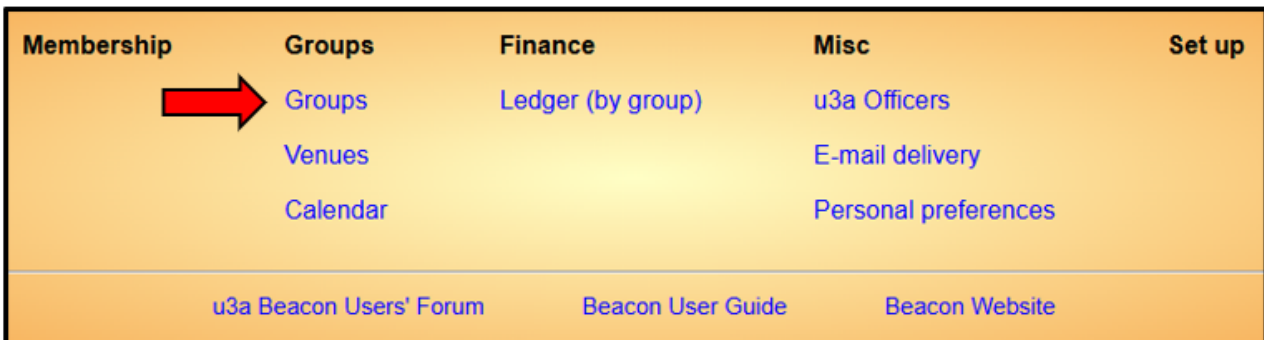
### 1. Groups List

The operations described on this page are typically available to Group Leaders, Groups Co-ordinators and some Committee members.

#### The Groups List

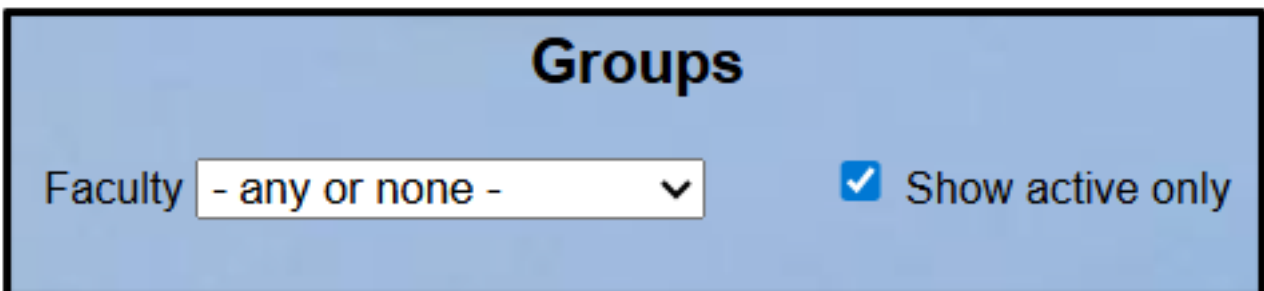
As a Group Leader your Home Page will look similar to that shown below, depending on the extent of system access given to you by your u3a committee.

Click the **Groups** link to view the Groups List (All the Groups)



The Groups List initially shows all active Groups and Group Leaders. To include non-active Groups, untick the **Show active only** box.

Your u3a may use the option to categorise similar Groups into **Faculties/Clusters** such as 'Art & Literature', 'Food & Drink', 'Walking', etc. To display only the Groups assigned to a particular Faculty/Cluster, select the Faculty from the drop-down list.



# Your Groups

Groups for which you are a Leader or you have viewing or editing rights are highlighted blue:

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z									
Select	Group	Active	When	Where	Leaders	Members	Max	Waiting	
▲▼	<b>A</b>								
<input type="checkbox"/>	Architecture	Y	2nd Tuesday at 2:00pm	Corn Exchange	Alan Abbey	8	7	1	
<input type="checkbox"/>	Art Appreciation	Y	3rd Thursday at 1:00pm	The Feelgood Centre	Brian Aardatt	11			
▲▼	<b>B</b>								
<input type="checkbox"/>	Basketball	Y	2nd Thursday at 1:30pm	Leisure Centre	Sammy Anderson	10		5	
<input type="checkbox"/>	Bee Keeping	Y	1st Monday at 2:00pm	Valley Farm	Brian Aardatt	8	12		

# Navigation

There are several features to help quickly navigate around the Groups List page:

- Clicking any **letter** in the block above the table will jump to Groups starting with that letter
- Clicking the **down arrow** in the top right corner of the page will scroll to the end of the list at the bottom of the page
- Clicking the **up arrow** in the bottom right corner to scroll back to the top of the page

Operations at bottom of page

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Select	Group	Active	When	Where	Leaders	Members	Max	Waiting
▲▼	<b>A</b>							
<input type="checkbox"/>	Architecture	Y	2nd Tuesday at 2:00pm	Corn Exchange	Alan Abbey	8	7	1
<input type="checkbox"/>	Art Appreciation	Y	3rd Thursday at 1:00pm	The Feelgood Centre	Brian Aardatt	11		
▲▼	<b>B</b>							
<input type="checkbox"/>	Basketball	Y	2nd Thursday at 1:30pm	Leisure Centre	Sammy Anderson	10		5
<input type="checkbox"/>	Bee Keeping	Y	1st Monday at 2:00pm	Valley Farm	Brian Aardatt	8	12	

- The up and down arrows in the left column perform a similar function

## 2. Group Records

To view the **Group Record** for your Group, click the Group name in the Groups List, or elsewhere where Group names are shown.

Each Group Record comprises 4 pages; **Details, Schedule, Members** and **Ledger**. You can select between these on the row beneath the Group Record name. The active sub-page has its name in black.

Group Record for Architecture

Details
Schedule
Members
Ledger

---

Group Details

Group

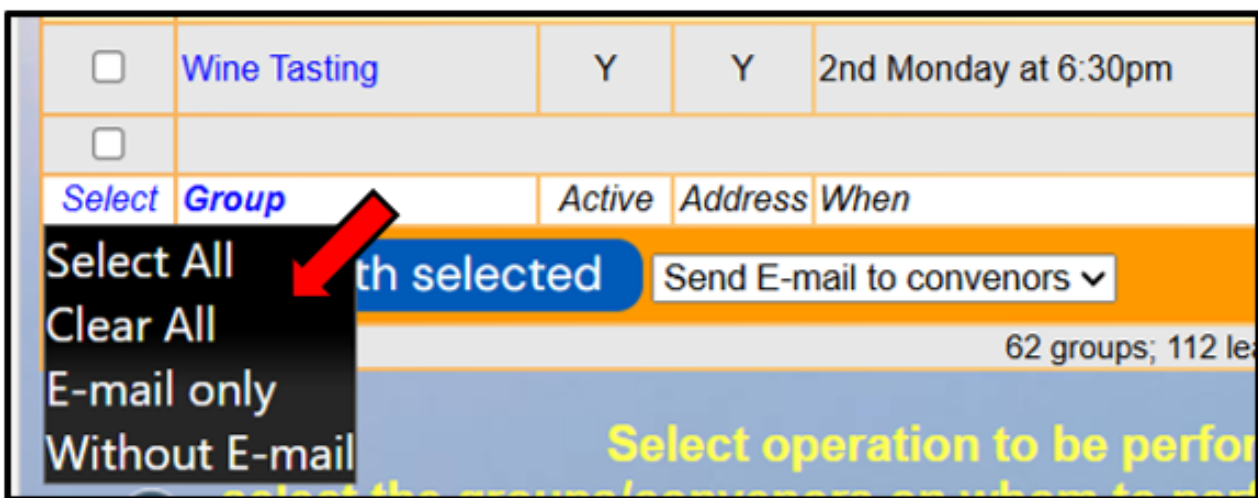
For details of how to view and edit your 4 Group Record pages, refer to:

### 3. Emailing Group Leaders

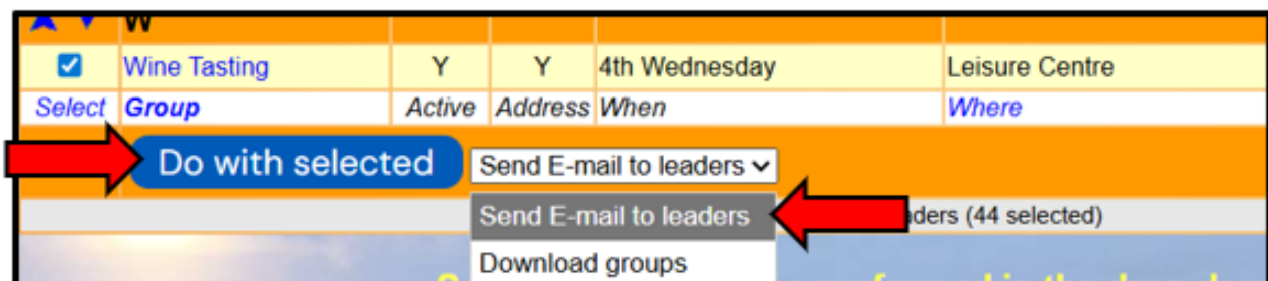
To send an email to one or more Group Leaders either tick the appropriate boxes next to the required Group Leaders in the left-hand column . . .

. . . or click '**Select**' at the bottom of the column, followed by one of the choices from the list that is presented:

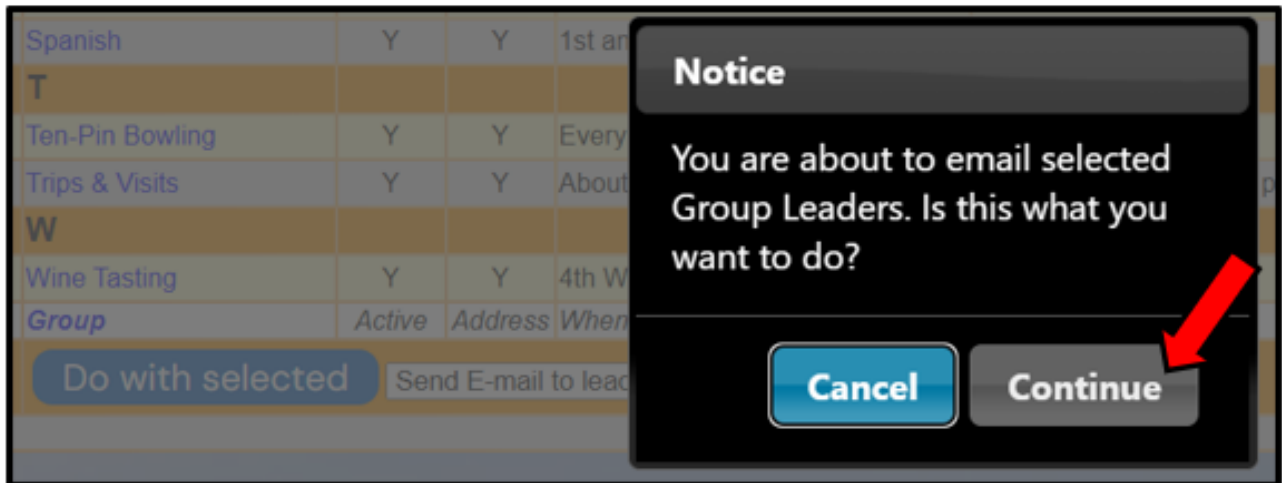
- **Select All** for all displayed Group Leaders
- **E-mail only** for Group Leaders with an email address
- **Without E-mail** for Group Leaders without an email address



Then select **Send E-mail to leaders** from the drop-down list below the table and press the **Do with selected** button:



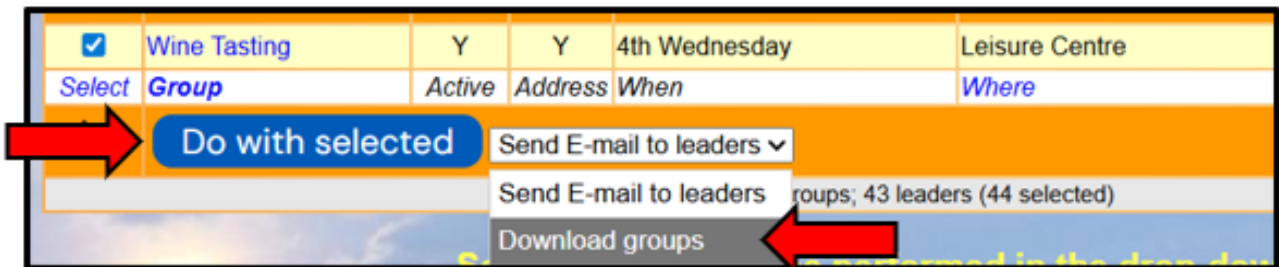
You will be prompted to confirm that it is your intention to send an email to Group Leaders by pressing **Continue** (or **Cancel** if that was not your intention):



Pressing **Continue** opens a form to compose the email.

#### 4. Downloading Groups

To download an Excel file showing details about Groups, select the required Groups as described in section c) above. Then select **Download groups** from the drop-down list below the table and press the **Do with selected** button:



You will be prompted to confirm that it is your intention to download Group details by pressing **Continue** (or **Cancel** if that was not your intention).

## 5. Viewing your Group Record and Ledger

### Viewing your Group Record

To view the **Group Record** for your Group, click on the Group name in the Groups List (see [5.1 Groups List](#)), or elsewhere where Group names are shown. Groups for which you are a Leader or for which you have editing rights are highlighted blue.

Each Group Record comprises four sub-pages:

- **Details**
- **Schedule**
- **Members**
- **Ledger**

You can select between these on the row beneath the Group Record title. The active sub-page has its name in black.



*Note: The things that you can view and the operations that you can perform may differ from those described below, according to the access you have been given.*

The Group **Ledger** can be used as a basic facility to record monies paid out and received by your group.

All Transactions are shown for the Group between the selected **From** and **To** dates (which default to the current financial year), together with the incremental current balance.

Group Record for Architecture						
Details		Schedule	Members	Ledger		
Group Ledger						
		From 1/1/2026 to 31/12/2026				
Date	Payee	Detail	In	Out	Balance	
		Brought forward			£15.00	
10 Mar 2026	Members	6 x £4	£24.00		£39.00	<a href="#">edit - delete</a>
11 Mar 2026	Corn Exchange	Room hire		£20.00	£19.00	<a href="#">edit - delete</a>
14 Apr 2026	Members	7 x £3	£21.00		£40.00	<a href="#">edit - delete</a>
15 Apr 2026	Corn Exchange	Room hire		£20.00	£20.00	<a href="#">edit - delete</a>
Date	Payee	Detail	In	Out	Balance	
<a href="#">Download Excel</a>						

Transactions can be edited or deleted by clicking the blue links on the right of the page.

An Excel copy of the ledger can be downloaded by pressing the **Download Excel** button (according to your access privileges).

*Note: There is no connection between this Ledger and the main Treasurer's Ledger, however:*

- The Treasurer is able to see an overview of your Ledger and add the income and expenditure to the main Ledger.
- Any Group Leader that has been given the privilege to view **Group ledger (as leader)** can view (but not edit) Transactions related to their Group in the Treasurer's **Ledger by Group** page.

## 6. Adding to your Group Ledger

To add a new **Transaction** fill in the boxes below the Ledger:

- **Date**
- **Payee** (can refer to both a person to whom money is paid and a person paying money to you)
- **Detail** (the reason for the transaction)
- Amount **In** or **Out**

Then press the **Save** button.

Group Ledger						
From		1/1/2026	to		31/12/2026	
Date	Payee	Detail	In	Out	Balance	
		Brought forward			£15.00	
10 Mar 2026	Members	6 x £4	£24.00		£39.00	edit - delete
11 Mar 2026	Corn Exchange	Room hire		£20.00	£19.00	edit - delete
14 Apr 2026	Members	7 x £3	£21.00		£40.00	edit - delete
15 Apr 2026	Corn Exchange	Room hire		£20.00	£20.00	edit - delete
Date	Payee	Detail	In	Out	Balance	
Download Excel						
Add transaction						
	20/04/2026	The Print Shop		Miscellaneous printing		12.50
Save						



Group Ledger						
From		1/1/2026	to		31/12/2026	
Date	Payee	Detail	In	Out	Balance	
		Brought forward			£15.00	
10 Mar 2026	Members	6 x £4	£24.00		£39.00	edit - delete
11 Mar 2026	Corn Exchange	Room hire		£20.00	£19.00	edit - delete
14 Apr 2026	Members	7 x £3	£21.00		£40.00	edit - delete
15 Apr 2026	Corn Exchange	Room hire		£20.00	£20.00	edit - delete
20 Apr 2026	The Print Shop	Miscellaneous printing		£12.50	£7.50	edit - delete

# Cheltenham u3a

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## FINANCE GUIDANCE FOR GROUP LEADERS

- Groups use **one of two systems** (Direct Accounting or Indirect Accounting) to record their income and expenditure. This usually relates to the hiring of a venue: **Direct Accounting** and **Indirect Accounting**
- Whichever system is used, the funds are owned by the Cheltenham u3a, and NOT by the group members.
- All expenditure and income must be recorded in the Group's Beacon Ledger.
- Contact the Treasurer if you need help updating the Group Ledger.

### Direct Accounting

Under the Direct System, the Group Leader, or their representative, collects their members' fees incurred during the group's activities (usually the cost of hiring a room) and pays them, preferably by BACS, into the Cheltenham's u3a bank account. The Group should be identified in the **payment reference**.

The Group Leader then sends room hire invoices to the Treasurer who arranges payment. The Treasurer updates the Beacon Finance Ledger (by Group). This is the preferred method.

The Group Leader, or their representative, is responsible for updating the Group Ledger in Beacon with all transactions.

The **Beacon Ledger by Account** and the **Beacon Ledger by Group** must reconcile at the end of each month. This provides an easy check as both Ledgers can be seen by the Group Leader and the Treasurer.

### Indirect Accounting

Under the Indirect System, the Group Leader retains the fees from which he/she pays the rental for a venue and other expenses - and the Group Leader must keep a detailed record of income and expenses.

He/she is responsible for entering these amounts into **Beacon Ledger by Group** if they have access.

OR

The Group Leader needs to send a **quarterly return** to the Treasurer who will make the entries in Beacon if they do not have access. If this is the case the Group Leader should consider requesting access to Beacon.

***Group Leaders should not maintain high balances of money collected from their Group's members for funding their activities as it puts a Leader at some risk if something untoward happens.***

***My advice is that you should pay this money into the Treasurer's Current Account as soon as is practicable. If you have to hold on to funds you should not hold more than three months' worth.***



# Cheltenham u3a

We learn, laugh and live because we exist for members by members.

## GROUP VENUES

<i>Name</i>	<i>Contact</i>	<i>Telephone</i>	<i>Accessible</i>
Abbeyfields Community Centre		07471684040	
Albion House Social Club		01242 523579	
Badgeworth Village Hall		01452 715034	
Bethesda Methodist Church		01242 269803	Y
Cafe Zest, Cavendish House		01242 521300	
Centenary Hall, Dean Close Junior		01242 267431	
Charlton Kings Community Library			
Cheese Rollers Pub		01242 862072	
Cheltenham Bowling Club	Peter Babbage	01242 524164	
Cheltenham Bridge Club	Patrick Shields		
Cheltenham Croquet Club			
Cheltenham Leisure Centre		01242 528764	
Cheltenham Library		01242 532691	
Christchurch Parish Centre , Christchurch Road		01242 578163	
Churchdown Community Centre			
Community Resource Centre, Grove St		01242 692112	
Cricket Hall - see Cheltenham Leisure Centre			
Education Room, The Wilson		01242 387488	
Everyman		01242 572573	
Friends Meeting House, Warwick Place		07419284515	
Hatherley Scout Hut			
Hesters Way Neighbourhood Project		01242 521319	
Highbury Church, Oxford Street		01242 520522	
Holy Apostles, London Road, Charlton Kings		01242 242570	
Honeybourne Gate	Jonathan Stacey	01242 233694	
Isbourne House, Off Oriel Road		01242 254321	
Lewis Carroll Lodge	Andrea Ward	01242 894186	
Lilian Faithful House in Suffolk Square		01242 514319	
Lilleybrook Golf Club			
Lynworth Hall	Simon Measures	07505917147	
Neighbourhood Resource Centre		01242 235511	
New Terrain Sandford Park			
Oasis Community Centre, Hesters Way		01242 580022	
Oily Rag Cafe			
Parmoor House		01242 524632	

Pavilion		01242 263344	
Phoenix, St Vincents		01242 511237	
Pip and Jim's Church, Leckhampton		07498623855	
Playhouse Theatre		01242 522852	
Prestbury Church Hall		01242 239590	
Prestbury Library		01242 234540	
Prestbury Tennis Courts			
Prestbury Women's Institute Hall			
Private Address			
RAFA Club		01242 524384	
Richmond Villages	Steve Gerrard - Senior Village Adviser	01242 474333	
Rushworth House		01242 237842	
Sacred Hearts Parish Hall		01242 524932	
Scout Hut	Paul Murphy		
Southam Village Hall			
St Andrews Church Hall Montpellier			
St Margaret's Hall and The Annex	The Bookings Secretary	01242 695387	
St Mark's Methodist Church Hall, Gloucester Road		01242 583613	
St Matthew's Church		01242 519520	
St Philip and St James Parish Church		01242 704837	
Stanton Rooms		01242 250087	
Tennis Courts, Montpellier			
Tivoli Cinema		01242 339176	
Tivoli Pub		01242 386738	
Trés Café		01242 702148	
Uckington Elmstone Hardwicke Village Hall		01242 233631	
Unitarian Church Hall		01242 255820	
Up Hatherley Library		08452305420	
Up Hatherley Village Hall			
Vitlers Coffee Shop		01242 570973	
Webbs Garden Centre, Restaurant		01242 672560	
Wheatsheaf		01242 525371	
YMCA Sports Centre			
Zoom or other electronic interaction			

# Cheltenham u3a

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## INCIDENT REPORT FORM

Please note that this form is to be filled in by a group leader, and should be retained on file by the u3a committee in case of a claim and for a period of three years even if a claim appears unlikely.

### 1. Your details

Name	
Position	
Email	
Tel. Number	

### 2. Incident details

Date and time of incident	
Injury or Illness?	
Where did the incident occur?	
Please describe the circumstances of the incident <i>Attach a sketch or photograph(s) if possible</i>	
Names of any witnesses	

Signature \_\_\_\_\_ Date \_\_\_\_\_

# Cheltenham u3a

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## GRANT APPLICATION FORM

Group making the application	
Name and address of contact	
Email	
Telephone number	
What is the grant required for?	
How will it benefit the Group and our u3a?	
Total cost of purchase	
Grant amount requested	
Date for spending the grant	
Name of person responsible for safe keeping and maintenance	
Any other relevant information	

Signed \_\_\_\_\_

Date \_\_\_\_\_

# Cheltenham u3a

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## Risk Assessments

Outdoor sporting risk assessment	24
Walk leader risk assessment	27
Day trip risk assessment	30
Holiday travel risk assessment	31
Home based risk assessment	33
Venue based risk assessment	35
Risk management guidance for Committees	37

## OUTDOOR SPORTING RISK ASSESSMENT CHECKLIST

This checklist is to help in the planning for an outdoor sporting activity. This isn't an exhaustive list, so think carefully about any specific risks you may encounter. It is likely that you will need to add to this risk assessment checklist. This form can (and should) be altered to suit specific activity requirements.

Where you identify a particular risk, you should note the actions you will take to reduce the risk. It's important to carry out a risk assessment checklist before the activity takes place, and you can always add to this during the activity.

<b>u3a Name:</b>	<b>Date:</b>
<b>Name of person completing risk assessment checklist:</b>	
<b>Interest Group:</b>	
<b>Description of Activity:</b>	

	Risk Assessment Checklist	Yes	No	N/A	If no, what actions will you take to mitigate this risk?
Member wellbeing and safety	Have you taken a register of attendees?				
	Do you have the emergency contact details of each attendee if members are happy to provide this information?				
	Have you checked the weather to ensure that it is suitable for this u3a activity to go ahead?				
	Do all attendees have access to water?				
	Have all attendees removed loose jewellery (if appropriate)?				
	Are all attendees wearing suitable clothing/footwear?				

	Have attendees appropriately warmed up?				
	Have attendees had the opportunity to make the group leader aware of any illnesses that may impact their participation and what actions should be taken if illness occurs? Note, this is not an obligation on members.				
	Is there a space for attendees who need to take a break?				
	Is there a first aid box that is easy to access and fully stocked?				
	Are attendees aware in the event of a serious incident, they should call emergency services even if there is a trained first aider present?				
Activity area/ public space	Is the activity taking place in an area specifically designed for this activity (e.g., a tennis court)?				
	Is the activity area suitable for the activity taking place?				
	Is the activity area accessible to attendees?				
	Is the activity area accessible to emergency vehicles?				
	Have you inspected the ground and activity area for hazards?				
	Have you removed any hazards in the activity area if safe to do so?				
	Are spectators a safe distance away from the activity area?				
	Is there a secure area to store attendees' belongings during the u3a activity?				

Equipment	Is the equipment in good condition and fit for use?				
	Have attendees received a demonstration on how to use equipment correctly?				
	Is there the correct equipment/vehicle to transport heavy items required for the activity (if applicable)?				
	Is there a lockable storage or secure area to store equipment when not in use (if applicable)?				

Other identified risks:	What will you do to mitigate these risks?

## WALKS LEADER RISK ASSESSMENT CHECKLIST

This checklist is to help walk leaders in the planning for a walk. This isn't an exhaustive list, so think carefully about any specific risks you may encounter. It is likely that you will need to add to this risk assessment checklist. This form can (and should) be altered to suit specific walk requirements. You may wish to ask dog owner to read the BMC guide to reducing risk when encountering cattle: <https://www.thebmc.co.uk/Taking-care-around-cows>

Where you identify a particular risk you should note the actions you will take to reduce the risk. It's important to carry out a risk assessment before the walk takes place, and you can always add to this during the walk.

u3a Name:	Date:
Name of person completing risk assessment checklist:	
Interest Group:	
Description of Activity:	

	Checklist	Yes	No	N/A	If no, what actions will you take to mitigate this risk?
Recce	Have you researched the route you will be taking to identify any hazards and/or obstacles? ?				
	Have you given members an overview of the walk and the identified hazards/obstacles e.g. the number of stiles, likely boggy areas etc?				
	Do members know the length and difficulty of the walk?				
Traffic	Are there suitable crossing places on the road?				
	Are your attendees aware they must maintain single file on road sections?				
Animals	Have you notified members of any routes through fields with livestock in?				

	Are dogs kept on leads in relevant areas (such as around livestock, in urban areas)?				
	Are members aware of the increased risk of attack by cattle when walking with dogs?				
	Is there any danger of ticks or bites/stings?				
<b>Safety</b>					
	Do you have the correct equipment needed for the walk (e.g., map, compass, whistle)?				
	Have you taken an attendance register?				
	Do you have emergency contacts for all attendees?				
	Do you have a charged phone with emergency contact details stored on it?				
	Does someone know when you are expected back?				
	Have members been reminded to wear appropriate footwear?				
	Do you have a back marker to stay in sight and communication with group?				
	Is there any danger you will lose visibility or mobile phone signal?				
	Have members attendees brought refreshments (such as water) for the walk?				
	Is there a first aid kit?				
<b>Weather</b>					
	Have you checked the weather forecast for the day of the walk in advance?				
	Is there any danger of extreme temperatures, heavy rainfall, high wind or otherwise severe weather?				

	Have walkers brought suitable clothes and footwear, and appropriate items (such as waterproofs) for the weather?				
--	--	--	--	--	--

Other identified risks:	What will you do to mitigate these risks?

## DAY TRIP RISK ASSESSMENT CHECKLIST

This checklist is to help in the planning for a day trip. This isn't an exhaustive list, so think carefully about any specific risks you may encounter. It is likely that you will need to add to this risk assessment checklist. This form can (and should) be altered to suit specific trip requirements.

Where you identify a particular risk you should note the actions you will take to reduce the risk. It's important to carry out a risk assessment before the trip takes place and you can add to this during your trip.

	Risk Assessment Checklist	Yes	No	N/A	If no, what actions will you take to mitigate this risk?
Organising the trip	Has the committee Chair (or nominated committee member) been made aware of the trip and been given a copy of the itinerary, contact details and attendees?				
	Have all the participants been given the trip itinerary and details of the travel arrangements?				
Member Safety	Have the names and contact details of all the members attending been collected and stored securely?				
	Have all the participants supplied the details of a person/next of kin who can be contacted in an emergency, and is this stored securely?				
	Have all participants been made aware of the emergency procedures (such as what to do if someone becomes lost)?				
	Is there a first aid box that is fully stocked and regularly checked?				
	Have members been reminded to pack appropriate clothing/footwear for specific activities on the trip if appropriate (e.g., swimming, walking)?				
	Have members been reminded to bring any items they may need (such as medication) for the trip?				

Other identified risks:	What will you do to mitigate these risks?

## HOLIDAY TRAVEL RISK ASSESSMENT CHECKLIST

This checklist is to help in the planning for a trip. This isn't an exhaustive list, so think carefully about any specific risks you may encounter. It is likely that you will need to add to this risk assessment checklist. This form can (and should) be altered to suit specific trip requirements.

Where you identify a particular risk you should note the actions you will take to reduce the risk. It's important to carry out a risk assessment before the trip takes place and you can add to this during your trip.

u3a Name:	Date:
Name of person completing risk assessment checklist:	
Interest Group:	
Description of Activity:	

	Risk Assessment Checklist	Yes	No	N/A	If no, what actions will you take to mitigate this risk?
International travel	Have you checked the Foreign, Commonwealth and Development Office (FCDO) website for advice and guidance at: <a href="https://www.gov.uk/government/organisations/foreign-commonwealth-development-office?">https://www.gov.uk/government/organisations/foreign-commonwealth-development-office?</a>				
	Have you checked whether there are travel restrictions or requirements in place at: <a href="https://www.gov.uk/foreign-travel-advice?">https://www.gov.uk/foreign-travel-advice?</a>				
	Are any vaccinations required and is the group aware of this/meets the necessary requirements?				
	Do all members attending have the correct travel documents e.g., passports and visas, (and currency) and are these in date?				
Organising the trip	Have you used a tour operator (e.g., a travel agent) to organise this trip?				
	Has the committee Chair (or nominated committee member) been made aware of the trip and been given				

	a copy of the itinerary, contact details and attendees?				
	Have all the participants been given the trip itinerary, contact details for hotels and details of the travel arrangements?				
Member Safety	Have the names and contact details of all the members attending been collected and stored securely?				
	Have all the participants supplied the details of a person who can be contacted in an emergency, and is this stored securely?				
	Have all the members attending the trip purchased adequate insurance cover (including holiday travel insurance)?				
	Have all participants been made aware of the emergency procedures (such as what to do if someone becomes lost, or someone takes ill)?				
	Is there a first aid box that is fully stocked and regularly checked?				
	Have members been reminded to pack appropriate clothing/footwear for specific activities on the trip if appropriate (e.g., swimming, walking)?				

Other identified risks:	What will you do to mitigate these risks?

## HOME-BASED RISK ASSESSMENT CHECKLIST

This checklist is to help in the planning for an activity in a member's home. This isn't an exhaustive list, so think carefully about any specific risks you may encounter. It is likely that you will need to add to this risk assessment checklist. This form can (and should) be altered to suit specific activity requirements.

Where you identify a particular risk you should note the actions you will take to reduce the risk. It's important to carry out a risk assessment before the activity takes place, and you can always add to this during the activity.

u3a Name:	Date:
Name of person completing risk assessment checklist:	
Interest Group:	
Description of Activity:	

	Risk Assessment Checklist	Yes	No	N/A	If no, what actions will you take to mitigate this risk?
General	Is there enough space for all members in attendance?				
	Are there any trip hazards or anything that might make members slip or fall?				
	Are all walkways that members have access to kept free from obstruction?				
	Are there enough seats for all members in attendance?				
	Can everyone access the room? (n.b. there is no requirement to make home adaptations)				
	Have you taken a register of members in attendance?				
Electrical	Have you made sure there are no trailing leads or cables to prevent a member tripping?				

	Have all cables in use for this activity been visually inspected to ensure they are intact and safe for use?				
Fire Safety	Are all exits unobstructed?				
	Is there a working smoke alarm?*				
Wellbeing	Are light refreshments available to members? (e.g., water)				
	Have members been made aware of any pets?				

\*If you do not have a working smoke alarm, you can contact your local fire service for a 'Safe and Well Visit', during which they can fit a free smoke alarm in your home.

Other identified risks:	What will you do to mitigate these risks?

## VENUE-BASED RISK ASSESSMENT CHECKLIST

This checklist is to help in the planning for a venue-based activity, such as a community hall. This isn't an exhaustive list, so think carefully about any specific risks you may encounter. It is likely that you will need to add to this risk assessment checklist. This form can (and should) be altered to suit specific activity requirements.

Where you identify a particular risk you should note the actions you will take to reduce it. It's important to carry out a risk assessment before the activity takes place, and you can always add to

u3a Name:	Date:
Name of person completing risk assessment checklist:	
Interest Group:	
Description of Activity:	

this during the activity.

	Risk Assessment Checklist	Yes	No	N/A	If no, what actions will you take to mitigate this risk?
General	Is the area where the u3a activity is taking place in well lit and away from any hazards?				
	Are floor surfaces in good condition to prevent slips, trips, and falls?				
	Are all walkways kept clear and free from obstruction?				
	Are there enough seats for all members in attendance?				
	Has a register of members in attendance been taken for fire safety reasons?				
Electrical	Have you made sure there are no trailing leads or cables?				
	Is the use of socket adapters (e.g., extension leads) per socket kept to an absolute minimum to prevent overloading?				
	Have all cables been inspected to ensure they are intact and safe for use?				

	If the venue requires PAT testing, has equipment been PAT tested?				
Fire Safety	Are all fire exit and escape routes, fire alarm points and fire-fighting equipment clearly visible, unobstructed and appropriately indicated?				
	Have members been informed of safety procedures, including where to congregate in the event of a fire alarm?				
	Is there a working smoke alarm?				
	Is there a working carbon monoxide alarm?				
	Are all smoke and fire stop doors kept closed when not in use, and never wedged open (except doors on magnetic catches linked to the fire alarm system)?				
	Are appropriate procedures in place to assist disabled members who may be present during a fire evacuation?				
Equipment	Do you have a lockable and secure area to store u3a equipment, if applicable?				
Wellbeing	Are refreshments available to members? (e.g., water, tea)				
	Is there a first aid box that is checked regularly and has been stocked?				

Other identified risks:	What will you do to mitigate these risks?

# RISK MANAGEMENT GUIDANCE FOR COMMITTEES

## Category: Committee Procedures and

### Guidance 1 Purpose

To support u3a committees in identifying governance and operational risks, and to mitigate these risks.

## 2 Scope

Relevant to all u3a committee members.

## 3 Introduction

Risk management is the process of identifying, evaluating, and controlling risks, and is an important part of future-proofing your u3a. Anything that could potentially stop your u3a from achieving its aims should be seen as a risk. Identifying and understanding these risks will help you put the right measures in place to prevent them from happening. The aim is not to eliminate all risks entirely (this would be very difficult and not cost effective), but rather to reduce the risk to a level that your u3a is comfortable with.

## 4 Identifying the risks

The first step is to identify possible risks in the different areas of your u3a. The Charity Commission suggest ([CC26](#)) that you review risk under the following headings as a framework:

- **Governance risk:** In order to run your u3a, the committee should have the right skills for the role (either through prior experience or developed through mentorship and training with previous members in the role). Without a skilled committee (or a committee willing to learn), your u3a is at risk. This includes understanding trustee responsibility.
- **Financial risk:** This may have an impact on your ability to achieve your financial obligations. These risks include the risk of fraud through transferring physical cash to a bank account, or theft.
- **External risk:** This includes the reputation of your u3a, and any threat to the name or standing of your u3a (and the wider movement's reputation). It may be caused by your members (past and present), or committee members. Changes to government policy may also impact your u3a's ability to operate successfully.

**Operational risk:** This is a threat to your u3a caused by a breakdown in internal procedures. This risk may come from your committee not having the policies and procedures in place to run the u3a effectively. **Regulatory and compliance risk:** This refers to the risk of failing to comply with legislation. Following the u3a guidance and advice documents on the national website will help compliance with reporting rules and charity legislation can help prevent your u3a from falling foul of regulations (and reputational damage).

## 5 How to analyse risk

Once a risk has been identified, it is important to assess the likelihood of the risk occurring, and the impact it would have on your u3a if it did occur. Thinking about this together as a committee is a valuable exercise.

You should consider all the possible implications of the risk, some of which might not be obvious. For example, you may have a new Chair on the board that does not have experience as a Chair. There is a moderately high likelihood of this happening, and the impact on the u3a could be moderate. In order to mitigate this risk, the board can ensure all new trustees are fully inducted and offer their support when required.

## 6 Rating risks

It can be useful to give each of the risks your charity faces a score on a) the likelihood of it happening and b) the impact it would have if it did. For example, you could have a scale from 1-5 for likelihood, where 1 is the likelihood is rare, and 5 is where the likelihood of the risk occurring is certain. You could also have a scale from 1-5 for impact, where 1 is where the impact is insignificant, and 5 is where the impact is major (see Appendix 1 for an example scale).

You should calculate the initial risk score of each risk by multiplying the likelihood score by the impact score. For example, a risk with a likelihood of 2 and an impact of 3 would have a score of 6 (2 x 3). The risk score informs you of how urgent the risk is, as well as how much a priority it is – the higher the score, the higher the priority to address.

## 8 Reducing and controlling risks

The initial score is the level of risk before any mitigation action. Working together as a committee the idea to lower the level of each risk to one your u3a is happy with.

It can help to think about all the controls your u3a has in place to reduce the likelihood or impact of a risk. For example, if the risk is fraud, the controls are likely to focus on measure to decrease this risk, such as reviewing your financial policy, always having dual signatories, etc (please refer to our finance guidance on our website).

Once you've listed all the mitigation actions that you have in place for a risk, you can re-score its likelihood and impact to get a residual risk score to ensure that the mitigations are going to be effective in lowering this risk to an acceptable level.

## 9 Monitoring risks regularly

Risks change over time and committees are recommended to hold regular risk management meetings to check how well your u3a is dealing with them (at least once a year). These meetings can help you monitor whether the controls you have in place are still necessary and if there are any new risks to deal with.

## 10 Risk Assessments

It is helpful to develop specific risk assessments for individual risks related to group activities, to evidence that activities are safe to participate in – templates are available

on the national website under Support for u3as.

## 11 Appendix

### Appendix 1: Risk scores

Description	Score	Example
Remote	1	Only occurs exceptional circumstances
Unlikely	2	Occurs in a few circumstances
Possible	3	Occurs in some circumstances
Probable	4	Occurs in many circumstances
Highly probably	5	Occurs frequently and in most circumstances

Description	Score	Example
Insignificant	1	Not dangerous or damaging to u3a's operations and/or reputation, or damage is negligible
Minor	2	Unlikely to be dangerous or damaging to u3a's operations and/or reputation
Moderate	3	Somewhat dangerous or damaging to u3a's operations and/or reputation
Major	4	Mostly dangerous or damaging to u3a's operations and/or reputation
Extreme/	5	Very dangerous or damaging to the u3a's operations and/or reputation