

# THE THIRD AGE TRUST

## Dorking & District u3a - HANDBOOK FOR GROUP LEADERS

### INTRODUCTION

The purpose of the handbook is to provide advice and support to interest Group Convenors/Leaders. 'Group leader' is used in this handbook because it is a commonly used name, but other titles may be used in other u3as.

Group leaders and their groups are the lifeblood of a u3a, without which there would be no u3a. Some group leaders are experts in their subject, some have experience of working with adults in learning situations, some are new to both the subject and the task.

The handbook aims to provide guidance and group leaders should also record contacts and assemble any material relevant to their subject and group. This should mean that they have all the information they need, readily accessible and in one place, being added to and amended regularly, and serving both as a reference tool and a record of a group's activity. It will thus become an invaluable resource when the group is reviewing itself and when a new group leader takes over. The group leader file should be passed on to any person(s) taking over the group in the future to ensure continuity.

### THE AIMS AND GUIDING PRINCIPLES OF U3A

#### General

The u3as in the United Kingdom are operationally independent, self-help organisations run by the voluntary efforts of their members. All u3as are members of the Third Age Trust (a Registered Charity) which is their national support and advisory body. The word 'university' is used in its original sense of '**people coming together to share and pursue learning in all its forms**'. U3as have the following aims and guiding principles:

#### Aims

1. To encourage and enable those no longer in full time employment, irrespective of age, to share knowledge, skills, interests and experience.
2. To demonstrate the benefits and enjoyment to be gained from lifelong learning.
3. To celebrate the capabilities and potential of u3a members and their ongoing value to society.
4. To encourage the establishment of u3as in every part of the country where conditions are suitable and to support and collaborate with them.

### **Guiding Principles**

#### **The Third Age Principle**

- Membership of a u3a is open to all in their third age.
- Members promote the values 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; they are run by members for 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, which is 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.

### **SHARED LEARNING**

#### **Taking Responsibility For An Interest Group**

This section contains guidelines for all those with responsibilities for an interest group, whether they are starting a new group, hoping to enliven a group that has become stale, or working with a group that continues to thrive.

U3as are based on the belief that sharing learning is both effective and suitable for those in the third stage of life, no longer in full time employment or involved in full time childcare and wishing to continue learning. A u3a provides the opportunity to continue learning by the sharing of knowledge and experience and by sharing together in exploration of new fields.

## Dorking & District u3a – Group Leader Handbook

In a u3a interest group there is no common curriculum and no syllabus to follow. Each u3a and each interest group makes its own provisions according to the needs and wishes of its membership, meaning that life in each u3a is varied. It may include formal occasions with lectures, speakers, or activities, as well as social occasions which have grown out of the fellowship of people meeting to pursue a common goal, **but the core activity of a u3a is in the groups who meet to pursue specific interests.** Those who lead these groups will want to provide the best possible environment for learning to take place.

### What's in a name?

Group Leader? Facilitator? Convenor? Tutor? These are titles used in u3a. However, the choice is only important in so far as indicate a function.

A 'tutor' is usually expected to teach, a 'facilitator' provides opportunities for learning to take place, a 'convenor' may simply make certain that group members gather for group sessions, and a 'leader' might be expected to take the initiative.

Some u3as have more than one person to 'lead' a group, in some cases forming a small committee that plans a sequence of sessions, in other cases taking turns to 'lead'. In Dorking & District u3a we use the term 'leader' for the named contact in the group, whichever function that person has. Whatever you or your u3a have decided to call you, the important thing is that you and your group arrive at a clear and shared understanding of your role and of what you intend to do. The chances are that you will be all the above some of the time.

Most u3as have a Groups' Coordinator or Secretary to oversee all interest groups. In Dorking & District u3a we use the term 'co-ordinator' for the individual(s) who co-ordinate all the groups.

### Always Remember - Sharing Learning Means You Are Not Alone!

There are many sources of support available to you: the members of your group; your u3a Groups' Co-ordinator; the services of the Third Age Trust; workshops and Networks provided by local groupings to link you with group leaders from other u3as, and advice sheets and discussion documents issued by the Third Age Trust.

### SECTION 1      STARTING AND RUNNING A GROUP

This section is about setting up groups working in an environment where the focus is on shared learning. It includes information about the support services available from the Third Age Trust.

#### 1. STARTING A NEW GROUP

The practicalities of starting a new group, such as how it is advertised, how venues are booked, how it is funded, etc., are matters for individual u3as, and guidance for Dorking & District u3a will be found in Section 2 of this handbook.

This section covers responses to other questions that are often asked.

Groups start in several ways. Sometimes the group leader emerges first, and the group forms around the enthusiasm and/or the expertise of an individual. Sometimes the group starts with little more than a desire to learn about something and there is no obvious leader at the beginning. Sometimes a Groups' Co-ordinator has been asked to form a group and convenes a meeting with no intention themselves of even being a group member, let alone becoming the leader.

How a group starts doesn't matter. What does matter is that the group is clear on its objectives, sets **realistic** goals and identifies how those goals are going to be met to everyone's satisfaction.

##### a. Preparing for the first meeting

- It is useful to have a handout for the first meeting in the form of a checklist which focuses the group and encourages **shared responsibility**.
- If you are the potential group leader you should decide how much time/expertise you will realistically be able to offer and what you will expect of the group members. You will then be able to decide with the group how often it will meet and what input is to be expected from group members (see 2. below).
- Find out what help is available nationally and locally and talk to the Groups Co-ordinator who may be able to put you in touch with other group leaders in the area. There may be study days planned and there may be opportunities to meet with others to share experience.

##### b. At the first meeting

You need to decide your purpose, find out the skills within the group and the resources at your disposal, and then decide on a method. Agree on content (what the group aims to do), the level of the group (beginners, improvers, advanced), the process (practical, theoretical), and how the group will work (discussion, instruction, presentation etc).

- **Find out and make clear what the members expect of the group**

A successful group shares common expectations. If there is a wide range of expectations and there are enough members, consider forming more than one group or meeting on alternate dates. If this is not feasible, agree a programme that which includes as many different approaches as possible.

It is useful at the first meeting to agree on a brief description of what the group hopes to do and how they hope to do it. This will subsequently form a **statement of intent** which will help to keep the group on track and will inform potential new members. This is particularly important when there is more than one group offered in the same subject and is often the information needed by the Newsletter editor and/or the web-master when advertising your group on the website.

- **Identify expertise within the group**

To share learning it is important to find out what knowledge and experience exists in the group. You can then decide how the group is going to use such expertise. You may have many group members able and willing to share their knowledge and skills, or you may start with just one enthusiast. You may start with little or no obvious expertise. The group must also decide how it is going to gain expertise if little or none is present. The ethos of u3a is that its members share their knowledge and experience without financial reward, and paid tutors are not part of the ethos.

See Section 2 for more information of Local Matters to ensure compliance with both national and local policy, particularly in relation to any payment deemed necessary.

- **Decide on how to run group sessions**

There are a variety of methods including –

- i. shared presentations, which are dependent on the commitment of the members.
- ii. discussions, which are dependent on facilitators within the group and appropriate stimuli.
- iii. skills teaching, which is dependent on demonstrators.
- iv. lectures which are dependent on someone with lecturing skills.
- v. taught sessions with participation, which are dependent on someone with teaching skills.
- vi. fieldwork or trips, which are dependent on guides and any combination of the above.
- vii. attendance at Study Days, Summer Schools and local talks or workshops.

All methods are legitimate as part of the shared learning experience, providing they are suitable for the topic, use the skills available, and are accepted by the group. It is not necessary to choose one method for all time, as different formats will be suitable for different purposes.

- **Learning Styles**

Remember that people have individual learning styles: for some their preference is using visual means (images, diagrams, etc.), for others it is verbal (spoken/written words), auditory (music, rhythm), or physical (touch, movement). Some people prefer to learn alone, others prefer to work as part of a group, using discussion and reasoning as part of their learning process. Encourage your group to allow for and tolerate different styles in others.

- **Decide practicalities such as venue, contribution to costs, etc:**

Be realistic about this, bearing in mind what would be best for your subject and members. See Section 2 - Local Matters, to find out the procedure for advertising and convening interest group meetings, booking times and venues, insurance cover and financial matters.

- **Checklist:**

### **Time**

Look at different models regarding length of meetings, time of day, frequency of meetings (regular meetings over the entire year; regular meetings in term time; meetings arranged as and when thought necessary; short courses.)

### **Type of venue**

Consider the size of the group and what the group needs (e.g., type of chairs, tables, screens, equipment, accessibility. Think also about the subject matter and whether it needs a neutral rather than a domestic meeting place, a formal or an informal setting, and, in relation to this, whether there are costs involved.

### **Size of group**

The manageable size of the group will depend on the subject, learning approach chosen and accommodation. The ethos of the u3a is that it seeks to meet the needs of the membership and there should be no waiting lists. It may therefore at times be necessary to have more than one group.

## **2. SUSTAINING A GROUP**

Most successful u3a interest groups are generally self-motivating, and have usually run for many years. However, these can also be difficult to sustain because there is no

## **Dorking & District u3a – Group Leader Handbook**

external impetus; groups often need the participation of new members to inject renewed interest and motivation.

### **The static group**

- Because there is comfort in routine, the group that meets at the same time, in the same place and does the same thing may last a long time but may eventually become stale. So, think about varying the programme, the format, the delivery, and if appropriate, the venue. If you usually have discussions, occasionally invite a speaker; if you are usually tutored, occasionally have a discussion; if you usually sit indoors, plan a visit.
- Some groups that bond too successfully can be off-putting to new members, and this may not be healthy in the long run. Think about having the occasional open meeting where non-group members can discover the group. Your u3a may plan an Open Day when all groups can display their activities.
- Consider a 'Shared Learning Project' (SLP) with another u3a or an outside agency such as a museum. This can re-focus a group and provide a new purpose. (See national website)

### **The failing group**

- If a group is losing members, try to find out why by asking those who have left and those who remain. There may be a specific problem with which the group can deal.
- If the problem is unhelpful behaviour of a member of the group, then action must be taken. There are strategies for managing inappropriate behaviour (talk to your Groups Coordinator and Chairman). You might share your thoughts with other group leaders or attend a workshop on 'facilitating a group,' or 'understanding group behaviour.'
- If a group is simply lacklustre, then it may respond to something different, a special speaker, a special outing, a short on-line course. If such a project is then open to other u3a members, the group might also gain new members.
- It may be that the group has run its course in that form and the best action may be to close it, re-launching it at a later date.

## **3. PROBLEMS**

Remember that learning and sharing take place each time the interest group meets, but individual learning styles and approaches may vary. You might have an ideal that every member teaches and learns in equal measure, but this is not going to happen within every group every time. Try to provide learning situations where everyone is encouraged to contribute as much or as little as they are able at any given time. If everyone feels

comfortable enough to contribute, or indeed not to contribute, then it is a good learning environment.

**If there is a problem, approach the group itself.** Often the solution is there, and a healthy organic group will provide it, but this can only happen if the members of the group are made aware of any concerns and are encouraged to address them together.

Don't hesitate to ask the Groups Co-ordinator or Chairman for help. A group leader in another u3a may also be able to help.

## **4. SUPPORT FROM THE THIRD AGE TRUST**

### **Subject Advisers**

Most interest groups will have a national subject adviser willing to share their knowledge and experience (see list on national website). They may offer 'Start Up' leaflets, telephone or email consultation, networks, newsletters, study days or workshops.

### **Online Courses**

Often referred to as MOOCs (Massive Open On-Line Courses), there are huge numbers of courses available online from universities throughout the world, and new courses are being developed all the time. Although these courses are designed to be followed individually, the material is often suitable for use by groups.

### **Shared Learning Projects**

A typical Shared Learning Project (SLP) is based on an institution, such as a gallery or museum. Members from more than one u3a collaborate with a representative of the institution, often the Education Officer, and agree a project of mutual benefit. Timing, method and outcome are agreed. Reports on the results of this team research are written up and may be presented orally to the collaborating u3as and to the institution. Reports on some of the projects to date can be read in 'Sources' and on the website, and there is a collection of reports in the Resource Centre. These cooperative projects offer exciting and enjoyable opportunities for sharing expertise and learning.

Each region has a Regional Trustee, who is the link between the Third Age Trust and individual u3as; they may be able to advise you on what is happening in your area should you wish to start a Shared Learning Project. Please remember to register the project at National Office. (see national website and SLP leaflets).

### **Summer Schools**

The Third Age Trust have run national Summer Schools for several years and offer members a chance to spend four days studying in a residential setting. They are typically on a college campus and the tutors are themselves u3a members. A list of courses available at Summer Schools is published each year in the preceding autumn



## Dorking & District u3a – Group Leader Handbook

by direct mailing, in 'Third Age Matters' and on the website. The cost is dependent on accommodation.

### Contact details

Because officers of the Third Age Trust change, questions may initially be directed to the CEO, Sam Mauger, at the Third Age Trust, 52 Lant Street, London, SE1 1RB. Telephone 0208 466 6139 [national.office@u3a.org.uk](mailto:national.office@u3a.org.uk). Website: [www.u3a.org.uk](http://www.u3a.org.uk)

### SECTION 2      LOCAL MATTERS

This Section contains practical information and tips relevant to Dorking & District u3a.

**Contact details of all Committee members can be found in the current edition of the Newsletter and on our website [www.dorkingu3a.org.uk](http://www.dorkingu3a.org.uk)**

Thank you for offering to become a Group Leader. You will have seen in the first section how important your role will be and how much Dorking & District u3a depends on your contribution to the life of your u3a.

Section 1 provides you with general information and advice about the setting up and running of interest groups. With this information we hope that you have managed to meet with others wishing to follow your chosen interest and have chosen a group model and decided on the timing and duration of meetings.

Our Groups Co-ordinator will be pleased to help and guide you with any part of this. If you have chosen to meet in any venue other than the home of one of the group members, check out the list of venues with rooms for hire at the end of the handbook.

#### **Practical tips**

- In consultation with the Groups Coordinator, advertise your group, its meeting time and place in the newsletter/handbook and on the website.
- Make a list of all members of the group, and record attendance. Members unable to attend a session should inform you of likely absence.
- Check that all members of the group are members of the u3a. A prospective member may attend a group **once** before being required to join. (if possible, ask to see a copy of their membership card or ask for their u3a membership number).
- Send a list of group members to the Groups Coordinator and to the Membership Secretary who will update Beacon and give you advice on how to use the Beacon database.
- If your group is full, give the names of those wishing to join to the Groups Co-ordinator so that it can be decided whether another group should be launched.
- Keep a simple record of what your group does. This can provide information for the wider membership and it will be valuable for a new leader who may need to take over the group.
- If a group meets in the home of one of the group, establish a method of payment to contribute to the cost of any refreshment provided and the potential cost of photocopying and materials, etc.

## Dorking & District u3a – Group Leader Handbook

- If payments need to be made on behalf of your group (cost of speaker/lecturer, hire of room, equipment, DVDs, etc), agreement should be reached with the group on the weekly / monthly sum to be contributed by the group members (usually in blocks of an agreed number of weeks). These contributions should be collected by you or another member of the group at the beginning of the period and sent to the Dorking & District u3a Treasurer. The preferred method of payment is by cheque made out to Dorking & District u3a (GROUPS) and NOT to an individual. The Treasurer will then settle any invoices sent to her. **Please keep a record of receipts and expenditure to be sent to the treasurer at the end of the financial year.**

*Note: small contributions for refreshments, photocopying, etc. do not need to be passed to the Treasurer.*

- If a u3a group needs a paid instructor (e.g., as tutor for a physical activity for which there is no suitably qualified member) the current guidelines regarding recording of National Insurance and Unique Tax Reference numbers and qualification and insurance status should be followed (see National website).

### Available Equipment

Dorking & District u3a owns two digital projectors and three screens. These are in the care of Bob Crooks (01306 740062) and John Sinclair (01396 711542). You should give them good notice of your need to borrow one. We also have one laptop which can be used with a projector, and a Conversor (portable hearing link) with ten 'listeners. The Conversor is in the care of John Sinclair (01306 711542)

### Copyright Licence

The Third Age Trust currently organises a licence for photocopying.

### Data Protection

New legislation has introduced stricter regulation of the type of members' data that can be collected and how it is held. Advice can be found on the Third Age Trust national website (under the Advice tab). To summarise:

- we are advised to gather only information for which we can justify the need.
- tell those from whom it is gathered why it is needed.
- keep any personal information in a secure place.
- destroy such information as soon as no longer needed.

**If interest groups share information such as telephone numbers and email addresses within the group ONLY if everyone has agreed; and send all emails to the group as bcc.** Ask members to sign a form that gives permission for details to be used for communication purposes only.

## Dorking & District u3a – Group Leader Handbook

We have adjusted our membership application form according to National Office guidelines and advise Group Leaders to use the Third Age Trust Beacon data management method to make things safer. Beacon holds current member contact and membership details and is updated by the Membership Secretary. The Data Protection policy details how personal information will be gathered, stored and managed in line with data protection principles and the General Data Protection Regulation. National Office continually review the policy.

### Equality And Safeguarding

You should be aware of the Equality and Diversity policy and Safeguarding policy – both are on the website. If you have any concerns about equality/inclusion issues or safeguarding issues, speak to the Chairman, Regional Trustee or National office.

### Insurance

See the attached Overview of the Insurance provided by the Third Age Trust for u3as (also on national website).

**Venues** (see attached Venue Risk Assessment Checklist. Also, on national website)

When it is not possible to meet in a member's house (or rotation of houses), it is possible to hire rooms from:

- Christian Centre, Dorking: Janette Masters 01306 886830;  
[centremanager@dorkingmethodist.co.uk](mailto:centremanager@dorkingmethodist.co.uk)
- St John's Community Building, North Holmwood: Brian Joannou; 01306 887411  
[bookings@stjnh.org.uk](mailto:bookings@stjnh.org.uk)
- St Joseph's Church Hall, 2 Falkland Grove, RH4 3DL: Penny Dubois;  
[dorking@abdiocese.org.uk](mailto:dorking@abdiocese.org.uk)
- Crossways Community Baptist Church, Dorking: 01306 876714;  
[church@crossways.info](mailto:church@crossways.info)
- United Reform Church, Follett Hall: Denise Hooker 01306 889644;  
[dorkingurclettings@hotmail.co.uk](mailto:dorkingurclettings@hotmail.co.uk)
- St Mary's Church, Pixham Lane: Julie Mellows, 01306 889404
- Brockham Recreational Pavilion: Reg Chitty 01737 843361
- Hamilton Room, Old Reigate Road, Betchworth, RH3 7DE; 01737 843044
- The Lincoln Arm, Station Approach, RH4 1TF; 01306 882820

## GROUP LEADER AGREEMENT FORM

### DORKING & DISTRICT u3a

Group:

.....

Name:

.....

Telephone number:

.....

Email address:

.....

**I agree** that the information provided may be used to communicate with me for group purposes. **Please tick [ ]**

**I agree/do not agree** that my telephone number and email address may be shared with other members of this group. **Please cross out as appropriate.**

**Signed:**

.....

**Date:**

.....