

## Effective from

1<sup>st</sup> July 2026

This guidance supersedes any other guidance with an earlier effective from date.

## Purpose

Provide help for Witney u3a Group Leaders setting up and running their group. It also provides pointers to where additional guidance is available.

## Setting up a Group

Tell the Groups Co-ordinator you are interested in setting up a group. The Groups Co-ordinator can be contacted via the website.

Give your group a name and suggest a brief description of it. HMRC allows the u3a charitable status and to claim gift aid because we share knowledge – it does not sanction “teaching” so please be mindful of this in your descriptions.

The Groups Co-ordinator will help you plan how to set up and manage your group.

## Things to consider

- good days and times for a new group (or maybe evenings or weekends)
- who will do what (would a Co-Leader be helpful?)
- any resources needed
- venue – this will determine how many can be accommodated and if you will need to collect contributions towards room hire etc.

Once the group is established, the Groups Co-ordinator will help you to set up a page for your group on our local website and help you to manage your membership on our database which is called Beacon.

## Additional information you might find useful

### Local level

The Committee will support you in any way it can regarding running your group.

Most Committee members can be reached through Contacts on our website.

If you are not sure which committee member to contact if ask the Groups Coordinator or contact the Virtual Office.

### National level

National u3a offers a lot of Support and Subject Resources though its main website:

<https://www.u3a.org.uk>. You need to log in to the site first.

There are areas to help with:

- Interest Groups and outlines of Group Leader roles

- Subject Advice and u3a members who are specialists in their subjects ready to share ideas or answer questions
- Resources and learning materials
- Health and Safety\*
- Licences and Permissions for audio-visual, music, copying or re-using digital and printed text material\*

\*Remember that the Committee should be a first port of call if you have an issue with legal implications.

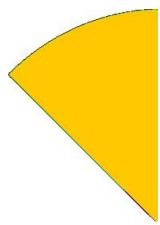
## Insurance

Insurance cover is provided automatically to u3a members via a group policy (details and FAQ available on the national website).

## BEACON

Use of our member database (Beacon) conforms to General Data Protection Regulation UK (GDPR UK).

**THANK YOU for setting up a new group – it helps us to offer a variety of activities to our members!**



## Guidance for Day-to-Day Management

Thank you for leading your group. Interest groups are at the centre of u3a and your role is invaluable.

It is imperative that you use the Beacon system for the day to day running of your group and sending out group emails as this ensures compliance with data protection rules as well as making sure that contact details are always up to date. Using personal systems (such as own email) exposes both you and committee members to the risk of data breach and personal legal liability. Any more specific guidance will be provided as appropriate on a regular basis by the Groups Coordinator.

Members of the group need to be paid-up members of u3a. This is essential for our insurance cover. You can see the status of your group's members on Beacon (unpaid show up red) or, if in doubt, by checking with the Membership Secretary. Anyone who is not a paid-up member of Witney u3a cannot attend a group activity as this would invalidate our insurance.

Check members can safely access your meeting place/s. Use the appropriate risk assessment checklist (provided as links on our website). Please inform the committee immediately if there is any incident/accident as we need to advise our insurers of any potential for a future claim however unlikely this may seem to you at the time of the incident.

Please obtain members' permission before taking or publishing any group photos.

## Thinking Ahead

Consider asking other members of the group to be Co-Leaders. They can help with any administration and cover for you when you are away or ill. Ideally, the group should carry on if you are not available.

Try to involve other members in the planning and running of the group and the sharing of ideas as it shares the load and may help in succession planning if you want to step back at any time.

Don't forget that the national website has subject advice and ideas which may help you with your group activities.

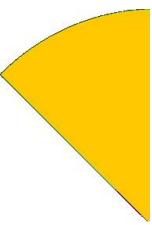
If your group becomes too big in numbers, or for the space available, liaise with the Groups Coordinator. If your group becomes too small, ask the Groups Coordinator to help advertise for additional members.

The ethos of u3a is to be inclusive so wherever possible groups should try to accommodate new members.

## Finances

Each group should be self-funding ideally although extraordinary items may be considered by the Committee. If a group cannot raise the funds from members to cover a large purchase that is needed or to continue the group, they should put their request in writing.

Any expenses relating to the group should be shared between the group members and records kept. Beacon includes a ledger for each group.



As the u3a is a not-for-profit organisation, the group should not build up a large surplus of funds (under £200 is advisable). If this does happen fees should be reduced or a free session offered or surplus funds can be passed over to the u3a Treasurer and utilised for alternative purposes.

The Treasurer will require an end of year balance from each group for u3a records even if the balance is nil. Please use the group ledger if you record cash transactions.

If you acquire anything for your group which might sensibly be construed as a u3a asset (such as equipment), please advise the Groups Coordinator.

## Outings and Walks

Group leaders may wish to organise outings for their particular group as part of their group activities. For them to be run successfully and safely, it is important that such trips should be organised in accordance with Witney u3a's policies and guidelines. Please also try to avoid clashes and overlaps with other activities that may be taking place within the organisation.

Take an accurate list of every member on any trip. Make sure that everyone carries emergency information (ICE number in phone, details in diary etc).

Be aware of any risks and check accessibility. Consult the national website for any advice specific to the group or activity.

Where larger sums of money are involved, there should be prior agreement over the handling of payments with the Social Account Treasurer before any payment or firm booking is made. If agreement with the Social Account Treasurer has not been established prior to payments being made or invoices received, any payments from participants or invoices from external contractors submitted to the Social Account Treasurer will be either refunded or not be paid.

**[Trips, outings and visits available to ALL Witney u3a members** are subject to a separate range of accounting requirements as set out in Witney u3a's Financial Policy (available as link on our website) under the section headed 'Trips, Outings and Visits.')

## Changes to your Group

Advise any material changes or problems to the Groups Coordinator.

Membership changes should be made by you via Beacon.

Send any revised text and photos for your group's website page, to the Webmaster.