



Llandudno Area u3a Group Leaders Handbook

The Purpose of this Handbook is to
provide advice and support to current and prospective Interest Group Leaders.

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Document change control

u3a	Llandudno Area u3a Group Leaders Handbook		
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0.1	Draft document	24/03/2025	
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1.3	Section added ref Removing members who have not attended for a while	30/1/2026	
1.4	Section added ref Inappropriate Behaviour	28/3/2026	

Introduction to Interest Groups

Thank you for agreeing to organise an interest group. We are sure you will find it very rewarding, however, it might seem a bit daunting initially. This handbook is intended to provide advice and support.

It is often said that interest groups are the lifeblood of the u3a, and each group will develop its own structure. However, it is important that your group follows the u3a ethos of shared, participative and self-help learning. The result will not only be an increase in knowledge, but a supportive and friendly atmosphere which enables everyone to participate.

u3a Principles

The u3a ethos is based on three 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.
- Learning is 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 u3a movement.
- No payments are made to members for services to any u3a.
- Each u3a is self-funded with membership subscriptions kept as low as possible.
- Outside financial assistance should only be sought if it does not imperil the integrity of the u3a.

Planning and Forming a New Group

You may be taking over from an existing Group Leader or starting a new group. If you are starting a new group, these are the recommended steps to undertake:

- Complete a Group Formation Form (see next page).
The form can also be downloaded from our website
- Agree the development of your group with the Groups Coordinator / u3a committee.
- Liaise with the Groups Coordinator/Treasurer regarding the financing of the group and how this needs to be reported.
- Consider what interest there might be in the subject perhaps by speaking to other members at a monthly meeting or asking for feedback in a newsletter.
- Consider what the aims of the group are – what are you hoping to learn/achieve/share by offering the group?
- Is there an existing Subject Adviser who can offer support with ideas for the development of the group? There is a list of all Subject Advisers on the [u3a website](#). An alternative could be to contact neighbouring u3as to see if they have a similar subject group and talking to the Group Leader. It may also be possible for you to sit in on a group meeting.
- Generate interest by promoting your group using as many different methods as possible. This could include developing publicity in the form of a flyer, poster, promotion via existing groups, via our newsletter, sharing at a monthly meeting and talking to members in groups that you attend. The more methods you use, the more successful you are likely to be.
- Think about where the group may meet. The committee can advise on existing venues. The choice of venue may affect the number of group members, group costs and the group's risk assessment.
- You must consider whether there are any risks that might occur as a result of the group's activities. Download the relevant [Risk assessment checklist\(s\)](#) to help you identify any and talk to the Groups Coordinator who will advise you on risk assessment procedures. If you're unsure or want further advice to speak with your committee.
- Identify what you want to achieve from your first meeting.
- Organise an initial meeting and invite those who have expressed an interest to attend.

Start up costs

Groups must be self-financing. However it is recognised that some expenditure might be necessary before the group has received any member fees.

The following support is available to assist with these:

- Grant of up to £50 to pay for a venue for the first group meeting.
This does not need to be repaid.
- Loan for initial purchase of equipment. These are considered by the committee on a case-by-case basis.
This **does** need to be repaid and you need to consider this when setting your group fees. Once the group is up and running, the purchase of additional or replacement equipment will need to be funded by the group.

Llandudno Area u3a Interest Group Formation Checklist

Group Name? <i>(Max 30 characters)</i>			
Group Leader(s) <i>(including ID numbers)</i>	Joe Bloggs (1230) Ann Other (1231)		
Group description	This group is aimed at people who ...		
Venue	Craig-y-Don Community Centre		
Faculty / category <i>Beacon maximum 1</i> <i>Siteworks multiple allowed</i>	Games Social	Group capacity <i>(optional)</i>	
Meeting day	Wednesday		
Start time	14:00	End Time	15:30
Meeting frequency	<i>e.g. Weekly, Fortnightly, Monthly, 1st and 3rd etc</i> 2 nd and 4 th Wednesdays of each month		
Cost <i>(Amount and frequency)</i>	£2 per session	How will payment be taken?	Cash
How will attendance register be kept?	Paper register		
A grant of up to £50 is available for hire of venue for first group meetings Do you want to apply for this?			Y / N
A loan for equipment purchase can be considered on a case-by-case basis. If applicable, enter amount and give brief details below			£

Risk Assessment

Is an up-to-date risk assessment attached? <i>Groups must have an up-to-date risk assessment</i>	Y / N
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Committee Use Only

Risk assessment reviewed by committee?	Y / N
Group approved by committee (if No, state reason below)	Y / N
Reason for rejection if applicable	
Date group approved by committee	
Amount of venue hire grant (if applicable)	£
Amount of loan approved (if applicable)	£
Date group leader received Beacon training	
Date group set up on Beacon	
Date group set up on Siteworks	
Does Group Leader have paying in book (if required)?	
Notes / Comments	

This form can be [downloaded from the Forms, Policies and Certificates page of our website](#)

The First Group Meeting

Recommended steps to take at the first meeting:

- Introduce yourself and the purpose of the group as you see it.
- Ask about the skills and experience within the group.
- Agree the tasks that need doing to run the group and who is willing to support these – for example, who is willing to help with developing the programme or keep the register.
- Agree, if relevant, the level that the group will be aimed at – beginners, improvers, advanced.
- Agree how the group will work – discussion, instruction, presentation etc.
- Agree when and where the group will run.
- Identify any accessibility needs that group members may have. Refer to our Equality, Diversity and Inclusion policy for advice and guidance.
- Agree the costs for running the group and what members will pay.
- Discuss how group members will communicate with each other bearing in mind data protection guidance (e.g. always using the BCC function on emails to avoid sharing addresses between all members) and always seek permission and agreement.
- Agree some ground rules e.g.
 - Be punctual
 - Listen to each other
 - Allow others to speak
 - Let someone know if you are unable to come
 - Agree to disagree amicably and be respectful to other group members
 - Every contribution matters
 - Have patience with and encourage those who are slower to learn

After your first meeting it is a good idea to feedback what was agreed with the Groups Coordinator to finalise arrangements.

Group Size

The maximum number of members in a group is determined by the Group Leader and may be limited by:

- The practicality of enabling all members to contribute to the discussion.
- The organisation & administration required to run a larger group
- Prior knowledge requirements (e.g. language learners - beginners and advanced).
- Venue size

Running the Group

Group Attendance Register

ALL groups MUST record their members and take a register at the beginning of each session, this is both to comply with legal obligations (e.g. fire regulations, insurance, health and safety) and to help you run your group.

Any people attending a session as a trial and any carers must also be included.

A list of members attending the meeting would prove invaluable in the event of fire or serious incident. They will also be required in event of a claim against our u3a insurance.

Failure to do so could leave the Group Leader/s open to legal action, as they won't be covered by our u3a insurance. We are also required to keep registers for up to 3 years.

Completing and keeping Group Registers can help to identify members who have perhaps missed several sessions and maybe taking up a place which could be utilised by another member on the waiting list.

Example register

Name	07/04/25	14/04/25	21/04/25	28/04/25	05/05/25	12/05/25	19/05/25
Janet Beard	£2.00	£2.00	£2.00	£2.00			
Cortez Brandt	£2.00	£2.00	/	£2.00			
Delbert Guerra	£2.00	£2.00	£2.00	£2.00			
Ian Hardin	/	£2.00	£2.00	£2.00			
Lillian Joseph	£2.00	£2.00	£2.00	£2.00			
Lidia Keith	£2.00	/	£2.00	£2.00			
Silas Leonard	£2.00	£2.00	£2.00	£2.00			
Derek Navarro	£2.00	£2.00	£2.00	£2.00			
Lorna Pierce	£2.00	£2.00	£2.00	£2.00			
Alexander Riley	/	£2.00	£2.00	£2.00			
Celeste Sellers	/	/	£2.00	£2.00			
Lesley Stewart	/	/	£2.00	£2.00			

Beacon allows you to download a list of your group members in Excel spreadsheet format. As well as the members' names, the list can include:

- Membership number
- Email address
- Telephone number(s)
- Emergency contact details

It is fairly easy to turn this into a register that you can either print to complete manually or complete electronically.

If you would like help in preparing a register, you can contact the Website Manager

- by email at websitemanager@llandudnoareau3a.org.uk or
- via the website at <https://llandudnoarea.u3asite.uk/committee/>.

Managing Group Membership

Adding / removing group members

Group Membership is managed through the Beacon system. All Group Leaders receive training in the use of Beacon. If you are a new group leader, this will be part of the group formation process.

Members can apply to join groups using the Beacon Member Portal. They may also make contact through the website. Group leaders can add members to the group or remove them

When a new member applies to join a group, they are put on a waiting list and the group leader is notified. If there are vacancies, the group leader should admit them to the group and if not, the member will remain on the waiting list. If a vacancy arises, then the group leader should admit people to the group on a first come/first served basis. Should the 'first person' on the Waiting List fail to reply within a set period (maybe 2 weeks) then the place should be offered to the next member on the list and so on until the place/s is filled.

Reviewing group membership

Regularly reviewing your group's attendance register enables you to see if anyone has not attended for a while – you can contact them to check if perhaps they've been unwell or have decided not to attend any more but forgot to remove themselves or to tell you i.e. there may be a good reason why there are absences

A member who misses three consecutive group meetings may be asked by the Group Leader if they wish to continue their membership. If they do not reply, or continue to miss a further three meetings, the Group Leader may remove them from the group.

Members on a Group's Waiting list for 3 months or more should be asked if they wish to remain on the Waiting List.

Removing Members From Groups who Haven't Attended for a While

Contact all those who haven't been to the Group in the last 3 sessions (or a time considered reasonable by the Group Leader) and ask if they still want to be part of the Group. Many simply don't reply, others may give a reason for not attending, perhaps illness.

If they fail to attend the group for the following 3 sessions (or a time specified by the Group Leader) the Group Leader has the right to remove them from the Group List.

The member can, if they wish, rejoin the Group, but chances are they would be added to the waiting list of the Group.

In all cases it's at the discretion of the Group Leader.

Members Requiring Carers

Carers are allowed to accompany members to their group/s and remain with the member free of charge without being a member of the u3a.

However if the carer should participate in any of the group/s activities they **HAVE TO BE A MEMBER**, i.e. they have to join our u3a. (This is for insurance purposes).

Members who require a carer should not be allowed to take part in any session without their carer, as this could invalidate our insurance and pose a Health and Safety risk for both the member and other members.

If a member who is not able to cope independently comes to a meeting without a 'carer', inform the Groups Coordinator as soon as possible to discuss how best to resolve this situation.

Money Matters

All groups have to be self-financing. It is not permitted (under Charity Commission guidance) for groups to be supported or subsidised by fees paid by the wider membership.

However support is available for certain costs associated with starting a new group. This is covered in the earlier section "Planning and Forming a New Group"

Group leaders are not permitted to open a bank account or take money from group members and place it in their own bank account.

Group Leaders should not hold more than £100 of the group's accumulated funds. Monies above £100 should be deposited with the Treasurer. If a surplus is accumulated then this must be distributed amongst the group members in some way - often this is done by having a free week/session.

Regarding u3a visits, outings, theatre trips, holidays etc. the u3a has guidance to help the organisers. u3a policy is whoever is organising an event should have those who are planning to attend pay in advance. This money should be held by the Treasurer who will then pay the venue, coach company etc.

Records must be kept of all monies taken from group members. For smaller amounts such as session fees, this could simply be a note on the group register (see example above). For larger amounts e.g. trips or visits, receipts should be issued.

As a general rule, all Group Leaders who handle money should report their financial activities to the Treasurer each month in a format specified by the Treasurer.

Groups with small running balances may be able to report less frequently but only after consultation with and the agreement of the Treasurer.

All Group Leaders will be asked to confirm the cash balance they hold on the 31st March each year. (*This is to aid The Charity Commission financial reporting requirement*).

As members of Third Age Trust which is a registered charity, we are not allowed to make donations to any other charity (Charity Commission Rules)

Policies and Procedures

All u3a members are bound by our Policies and Procedures. As a Group Leader you should familiarise yourself with key policies.

They cover areas such as:

- Data protection
- Safeguarding
- Equality, diversity and inclusion
- Accessibility
- Complaints
- Incident reporting

The policies can be accessed on the [Forms, Policies and Certificates page of our website](#).

If you have questions about any of the policies, please speak to the committee who can advise.

Copyright

A Copyright Licensing Agency licence allows some materials within limits to be copied for educational use within groups. Llandudno Area u3a has purchased a licence on behalf of the membership and it is available for viewing on the [Forms, Policies and Certificates page of our website](#).

The Third Age Trust also provides a PPL (Phonographic Performance) PRS licence to cover the playing of music and an MPLC licence to cover the showing of films. These are included in the fee that u3as pay to the Third Age Trust.

There are limitations to each of these licences and if you are going to be using copyright material in any form, for example, printed, audio or pictures, please check the [support for u3as section of the national u3a website](#) for further details.

Dealing with Problems

Accidents and Incidents

In the event of an incident involving injury and/or an incident involving damage to property, an incident report form MUST be completed. The [Incident Report form](#) is available on the Llandudno Area u3a website.

The form is to be filled in by a member of the committee, a group leader or the property owner and retained on file by the Secretary for 3 years in the event of a claim even if a claim seems unlikely (circumstances and initial responses can change!).

It is important to compile the Incident Report form as soon as possible after the event even though not all information may be available; it should be added to as required.

It is important to have an accurate record in case of future problems relating to the incident. For example, if damage is caused to property by a member of the group, take full details, as it may be the subject of an insurance claim.

The Third Age Trust provides insurance for group activities, and although **personal accident insurance cover is not provided by the Third Age Trust**, the insurance does cover items such as public liability and damage to property. [The insurance cover note can be found on our website.](#)

It is recommended that u3a members provide emergency contact details. Where they have done so, Group Leaders can view these on Beacon.

Issues Between Group Members

Sometimes issues can arise within a group that disrupt the smooth running and can spoil the enjoyment for everyone. Don't leave a problem too long before trying to resolve it. Talk to your Groups Coordinator or committee if you are unsure how to resolve the problem or just want someone to explore options with.

Where there is potential for friction it is advisable to begin by bringing it into the open. Either you or another person could try to facilitate a discussion either with the members concerned or with the whole group, but it is important that the facilitator remains neutral and non-judgemental. If you cannot reach a resolution informally speak to your Groups Coordinator or a member of your committee. If a situation does not resolve and becomes acrimonious your committee may need to implement their disciplinary policy.

If a member's behaviour is regularly disturbing other members of the group consult the Groups Coordinator for help. If you feel comfortable dealing with the issue in the first instance, then you can do so. Alternatively, you can seek additional support from your Groups Coordinator.

If there is a very serious problem in a session, it may be necessary to ask a member to leave for the remainder of the session. If this occurs please contact the Groups Coordinator as soon as possible after the end of the session.

Inappropriate Behaviour When Participating in Events/Activities

Group Leaders are reminded that they and their groups represent u3a when participating in events / activities. As such views and behaviours may reflect poorly on u3a and may not align with the stated values of the organisation. Should Group Leaders observe or become aware of any adverse incident they are to inform the Committee as soon as possible to enable the Committee to take the appropriate action.

Illness / Death

Unfortunately, sometimes a member of your group may become ill or even pass away.

Our u3a has a small compassion fund to allow us to send a get well card on behalf of the whole u3a to an ill member or a sympathy card to family.

A card can be sent by simply contacting the Chair or Secretary through the website. You can find contact links at <https://llandudnoarea.u3asite.uk/committee/>. We do insist that the request is made by the Group Leader to avoid any confusion.

Obviously, there is nothing to stop you arranging your own card on behalf of your group.

It is important to respect the wishes of the member (or member's family) when notifying the committee or other u3a members.

If the committee becomes aware of a member passing away, we will endeavour to inform the leaders of any groups of which they were members.

Other Help and support

- **Subject Advisers** are Trust Volunteers with specialist knowledge in a wide range of topics. Their contact details are available on the [national 3a website](#) and in the Third Age Matters magazine. Subject Advisers can provide advice on both the setting up of a group of their particular subject area and the sustainability of ones already in existence, which may benefit from new ideas or a different approach.
- [National 3a Subject networks](#) provide a platform for u3a members to connect and come together around their interests.
- [National u3a learning programmes](#) showcase a wide range of learning activities online for members to get involved in.
- [Networks](#), regions and neighbouring u3as allow you to draw on experience from within the movement.
- [National 3a website](#), in particular the support for u3as section
- [u3a newsletter](#) is a monthly e-newsletter, which can be subscribed to on the national u3a website.
- [The national u3a office](#) can be contacted by any member if you have questions or concerns. Email: u3a.office@u3a.org.uk or telephone: 020 8466 6139
- [External organisations](#) such as museums, libraries, schools, universities.