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GUIDANCE TO GROUP LEADERS

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1. PURPOSE OF THIS GUIDANCE

- 1.1. The purpose of a u3a is to share knowledge, skills and experience and to meet the social and learning needs of its members. It is dependent upon the enthusiasm of its members - their willingness to set up and run groups and to involve themselves in the groups and activities.
- 1.2. This guidance has been written with the aim of supporting any member wishing to lead a new group and as a point of reference for existing Group Leaders (GLs). The guidance is based on good practice identified by Ravenshead u3a (Ru3a). However, in some areas, where we are affected by legislation, the Executive Committee Members (who are Trustees of Ru3a) have a duty to ensure that we operate within the law and the parameters of our Public Liability Insurance. In these cases, the advice is more prescriptive, as is the case where the Third Age Trust (TAT) has identified and recommended that a particular best practice approach is taken.
- 1.3. The guidance should be read in conjunction with the documents held on the Ru3a website ravenshead.u3asite.uk/policies-and-documents (<https://ravenshead.u3asite.uk/policies-and-documents/>).

2. THE ROLE OF THE GROUP CO-ORDINATOR

- 2.1. The Group Co-ordinator role is, as far as possible, to offer support and advice to the GLs to enable the smooth running of the group, to act as a conduit between the committee and the GLs and identify and set up new groups to meet the needs of the membership.

3. THE ROLE OF THE GROUP LEADER (GL)

- 3.1. All groups require a GL. Their main function is to make all the necessary arrangements for the group meetings and to manage the group finances using the u3a administration system - Beacon¹. (The use of Beacon is now mandatory and training will be given to those who have authority to use the system). However, there is no reason why some, or all of the administrative roles may not be delegated, by mutual agreement, with other group members.
- 3.2. GLs may have particular skills to offer and choose to take on a tutorial role in addition to an administrative one but this is entirely optional. They may also arrange speakers² and/or visits³ if these are appropriate.

¹ Beacon is the on-line u3a administration system and its use is necessary to comply with reporting requirements of the Charity Commission, HM Revenue and the smooth running of the organisation. More information may be found in Section 11 of this document.

² only visiting speakers can be paid by Ru3a. Members of Ru3a or other u3as cannot be reimbursed for their services.

³ GLs organising trips should refer to the Guidance on the Ru3a website under Resources, Policies and Documents, Guidance for organising trips.

4. TYPES OF GROUP

***“Tell me and I forget. Teach me and I remember. Involve me and I learn”
Benjamin Franklin***

- 4.1. A social or activity study group with a definite educational aim.
- 4.2. A social or activity group with no defined educational aims
- 4.3. A study or activity group on a specific subject limited to a single or set number of meetings ('Bite-Sized' Groups)

5. SETTING UP A GROUP

- 5.1. A group can be established on any topic that interests a number of other members. If a member wishes to start a group, they should speak to the Group Co-ordinator to instigate the process.
- 5.2. In most cases the Group Co-ordinator will ask for expressions of interest in joining the proposed new group. Details of the proposed new group will be announced at the monthly meetings and reiterated in the monthly newsletter. (The number of names needed to start a group varies dependent upon the subject matter, venue size etc.) Once an appropriate number of members have expressed an interest, a planning meeting is usually (but not exclusively) held to discuss how the group should operate, focus and frequency etc.
- 5.3. The name of the group is agreed between the GL and the Groups Co-ordinator when it is initially set up. It cannot be changed without prior agreement of the GC (mandatory requirement as the name impacts on website, advertising etc)
- 5.4. A small start up grant may be awarded to new groups if there is an obvious need at the time of set up. This decision is made by the Groups Co-ordinator and is final. Start up grants cannot be made retrospectively to existing Groups.

6. NEEDS OF A GROUP

Each group should have:

- 6.1. A GL to co-ordinate/organise and to administer any finances using Beacon. This may be delegated, with mutual agreement, to a member of the group.
- 6.2. An agreed programme. This may also be delegated, with mutual agreement, to a member of the group.
- 6.3. A regular time and place for meeting – e.g. in a public venue or a member's house.
- 6.4. Sufficient numbers to make the group viable (this will vary dependent upon the subject matter, costs etc)

7. RUNNING A GROUP

- 7.1. **Ru3a advertising:** The new group will be advertised by the Groups Co-ordinator at the monthly meetings and in the monthly email. It will also appear on the Ru3a website, the trifold display board (shown at most Ru3a events) and promotional handouts.
- 7.2. **Group self advertising:** It is hoped that GLs will publicise their groups regularly by participating in the various promotional activities organised by the Ru3a (e.g. Ru3a Day, coffee mornings etc)
- 7.3. **Beacon:** The use of Beacon (the Ru3a administrative on-line system (see Section 11) is now mandatory and training will be given by a member of the Committee to the GL or person delegated to do the task. All active groups are entered onto Beacon by the GC at the time of the initial set-up and may not be changed later without agreement of him/her. (expressions of interest and Bite-Sized sessions are not considered to be active). The group details should be kept up to date and all income and expenditure recorded on the Beacon Ledger system. (Mandatory requirements)
- 7.4. **Group Assets:** All monies and assets (e.g. sets of games etc) of the group belong to the Ru3a and should be recorded on Beacon. Monies should be entered onto the Beacon Ledger and assets should be listed on the introductory page together – to include where these are held and by whom.
- 7.5. **Safeguarding:** All members need to be reminded that they are personally responsible for their own safety when attending events and a check list is available on the website⁴. However, all members of Ru3a should strive to safeguard the health, welfare and human rights of fellow members. See Section 12 below for further details.
- 7.6. **Venue Bookings:** The GL, or designated group member, should make venue bookings and inform group members of arrangements.
- 7.7. **Register of Attendance:** GLs should keep a register of attendance at meetings and enter the number attending on the Beacon ledger (this is now a mandatory requirement).
- 7.8. **Risk Assessment:** All groups are required to have a risk assessment.⁵ These will be agreed at the time the group is first set up by the Safety Officer and Group Co-ordinator in co-operation with the GL. The committee will endeavour to update all risk assessments on the stated due date.
- 7.9. **Adverse Incidents:** Any adverse incident (or a 'near miss') which may happen during a meeting should be reported immediately⁶ (this is a mandatory requirement)
- 7.10. **Closing a group:** If a group is in any difficulty or the GL has any concerns about its future viability, they should speak to the Groups Co-ordinator. Unfortunately, sometimes, for a variety of reasons, it is necessary to close a group. This can only be done by the Groups Co-ordinator or the Ru3a

⁴ Members Personal Checklist may be found on Ru3a website, Resources, Risk Assessments, General Risk Assessments, Personal Members Checklist.

⁵ Risk Assessments may be found on the Ru3a website under Resources, Policies & Documents, Guidance Accidents & Incidents

⁶ Guidance for Accidents and Incidents may be found on the Ru3a website under Resources, Policies and Documents, Guidance on Accidents and Incidents

Chairman in collaboration with the GL. (n.b. all assets and monies of the group belong to the Ru3a and should be returned. Monies will be ring-fenced for a period of two years in case the group is re-started. After the two- year period, monies will be transferred to the Ru3a and the disposal of assets will be decided by the committee in office at the time.

- 7.11. **Numbers in the group:** The GL may decide on a maximum number for their group. This may be due to factors such as size of venue or subject of the group etc.
- 7.12. **Waiting Lists:** A waiting list should be set up on Beacon and names of those members interested in joining entered by the GL. If the declared maximum number of members is reached and an existing member leaves, the name of the member on the waiting list who has been waiting longest will automatically be selected to fill their place if they wish.
- 7.13 **Non-attendance of group members:** If a group member does not attend a group meeting for more than two consecutive occasions without an apology or reason given, the GL should try to contact them to find out if they wish to continue as a group member and/or ascertain if there are any mitigating circumstances for their non-attendance. Depending upon the individual circumstances, the GL may then remove them from the group list.
- 7.14 **Member Code of Conduct:** All Ru3a members agree to abide by a Code of Conduct at the time of their initial membership application. Very occasionally a member may behave in a manner that is upsetting to other members and/or disruptive to the smooth running of the group. It is recommended that GLs use discretion and understanding to consider whether there are underlying factors (e.g. health, personal circumstances) that may be contributing to the problem and try and resolve the issue with minimum upset. However, if the matter continues and/or the GL feels that a member has contravened any aspect of the Code of Conduct⁷, they should speak to the Groups Co-ordinator or Chairman to discuss a way forward.

8. GROUP FINANCES

- 8.1. Groups should all be self-financing and therefore costs should be kept to a minimum and agreed between the group members. Costs may include the hiring of a venue, fees for speakers or tutors⁸, photocopying, refreshments etc. These costs should be shared between the group members by charging a small meeting fee or similar. Best practice is to collect monies from group members at each meeting. However, it is accepted that some groups may, for a variety of reasons, wish to collect by other methods (e.g. monthly, lump sum etc). It is recommended that, before implementing any of these alternative methods of collection, a discussion should be held with the Ru3a Treasurer.

⁷ Ru3a website, Membership

⁸ only visiting speakers can be paid by Ru3a. Members of Ru3a or other u3as cannot be reimbursed for their services.

GLs may like to keep their members informed of any expenditure to avoid any misunderstandings.

- 8.2. All income and expenditure must be detailed on the Beacon administration system by either the GL or the group member delegated with that responsibility (this is a mandatory requirement)
- 8.3. Groups may hold a small 'float' on Beacon to cover unexpected expenditure. However, to comply with insurance requirements, it is recommended that this be minimal⁹ (as a rough guide no more than £50 or sufficient to cover rent and other necessary expenses for two months). If a larger amount builds up, GLs may like to consider offering a free session.
- 8.4. Cost of venues should be paid by the group directly to the venue with the exception of the Village Hall, the Centre at St Peter's, the Church/Church Lounge Ravenshead Leisure Centre. Payment of these invoices should be made to the Ru3a Treasurer who receives a composite invoice each month. These payments should be made electronically via bank transfer.
- 8.5. Individual members cannot hold an individual bank account for Ru3a monies (this is a mandatory requirement)

8.6. Summary of best practice for GLs

- a. Enter all income and expenditure on the Beacon system as soon as possible.
- b. Collect monies to cover expenditure (e.g. venues) at each group meeting (or agree an alternative method with the Ru3a Treasurer, see 8.1 above).
- c. On receipt of the rent invoice:
 - **For the Centre at St Peters, Village Hall, Leisure Centre or the Church**, send payment, electronically, to the Treasurer
OR
 - **For other venues**, Pay directly to the venue.

- 8.7 **Donations to Charity:** Ru3a is a charity and as such can only make donations to another charity with the same objects. So, in our case, we could make a donation to another u3a or the Third Age Trust but we cannot fundraise or donate to another charity (say something like an animal charity or hospice) with objects or purposes different to ours. Ru3a members are permitted to make cash donations in their personal capacity to a highlighted cause (for example, where we have a guest speaker) but money must be personally collected by a representative of the other charity and must not go through Ru3a accounts (this is a mandatory requirement)

9. SUPPORT FOR GROUP LEADERS

⁹ Guidance on handling of cash may be found on the Ru3a website under Resources, Policies and Documents, Group Leaders Handling of Cash

- 9.1. The Group Co-ordinator and the Ru3a Committee endeavour to be available at all times for help and advice.
- 9.2. Any changes to policy and/or changes to this guidance will be communicated to the GLs as and when they occur.
- 9.3. An annual meeting will be held to keep GLs informed of latest developments, changes in policy etc. This meeting aims to achieve a two-way dialogue with the committee and the GL and is a good opportunity to meet with others and to share best practice and/or gather ideas and advice.

10. GUIDANCE ON ATTENDANCE OF MEMBERS AND NON-MEMBERS AT GROUP MEETINGS

- 10.1 **Members of Ru3a** can attend any group (unless the group is full and has a waiting list) just once, free of charge to give them (and in some circumstances, GL) an opportunity to assess whether that group is appropriate for them. If they wish to attend further sessions, it is necessary for them to join the group. This does not apply to bite-sized sessions where all attendees are required to sign up and pay for all the sessions in advance.
- 10.2. **Members of other u3as** can attend any group just once, free of charge, (with the exception of bite-sized sessions) as a visitor. If they decide to join that group, they are expected to become an Associate member of Ravenshead u3a.
- 10.3. **Non-u3a members** can attend any group just once, free of charge (with the exception of bite-sized sessions), as a visitor free of charge. If they decide to join that group, they must become members of Ravenshead u3a.
- 10.4 **Grandchildren or other friends and relatives of a member** may not participate in group activities although they may attend as part of a public audience (this is an insurance requirement¹⁰).
- 10.5. **Carers:** An exception to the points outlined above in this section are carers (or necessary companions) for any member who cannot attend a group meeting alone. These carers or companions may attend purely in their capacity as a carer but may not take part in the activities (this is an insurance requirement). A carer does not have to contribute to the room hire for routine meetings. However, where tickets are required (e.g. for visits, transport, theatres, meals etc), the full ticket price has to be paid.
- 10.6. **Bite-Sized sessions:** Attendance at these is restricted to Ru3a members only and all sessions must be paid in advance in full.
- 10.7. **Dogs:** Dogs (with the exception of Personal Assistance Dogs) may not attend any Ru3a meeting held in a venue or outside event (mandatory requirement due to insurance issues). Where a meeting is held in a member's home and a dog (or other animal/pet) is likely to be present, it is

¹⁰ Public Liability Insurance is an insurance against the legal liability of the u3a and is not a personal Accident Insurance. It would have to be shown that Ru3a, or its members, had in some way been negligent in causing injury to the victim.

suggested that GLs inform attendees beforehand in case anyone has an allergy or phobia.

11. BEACON (the Ru3a administration system)

- 11.1 Beacon (now a mandatory requirement) has been purchased by the Ru3a for GLs (or the designated group member) and members of the committee
- 11.2 It is used purely online in a secure website provided by the u3a Trust. There is nothing to download or install on a computer and it can be used on all Apple, Windows, Android etc devices such as laptops, tablets and smartphones.
- 11.3 The system is designed to make all group information, membership details, diary events and finance simple to operate by the group leader (or designated group member). It enables that GL to have full details of each member in their group along with the ability to email all group members using only Beacon.
- 11.4 GLs do not need to keep any of the above information personally on their computers or written down as the data is taken from the membership database which is updated regularly by the Membership Secretary. This then complies with GDPR regulations which would not be the case if details were kept on a member's personal device.
- 11.5 Training will be given to new GLs (or designated group member) prior to them being given access. This training will include adding and removing members to the group, using Beacon to communicate to members of the group or group officers, adding financial information on a simple 'ledger'
- 11.6 Ongoing support is available from the committee who may be contacted via Beacon in the 'Officers' section or via the website.
- 11.7 Beacon must be used purely for Ru3a business and not for personal correspondence (mandatory GDPR requirement).

12. SAFEGUARDING

Safeguarding refers to measures designed to protect the health, wellbeing and human rights of individuals. Everyone attending a group is responsible for ensuring that they have a level of health and fitness appropriate to participate in that group's activities. Safeguarding is the responsibility of everyone, and members should bring any safeguarding concerns they have to the committee (this can be via their GL). The Ru3a policy can be found on the website¹¹.

13. AMENDMENTS TO THIS DOCUMENT

- 13.1 Amendments may only be made by the Groups Co-ordinator after agreement with the committee. The GC will endeavour to notify all GLs as soon as possible after each amendment has been made.

¹¹ The Safeguarding policy can be found on the Ravenshead u3a site under Resources, Policies & Documents, Safeguarding.

- 13.2 To aid clarity and avoid confusion, the numbering of sections and bullet points shown in the original version of this document will be retained wherever possible – e.g. using the phrase ‘left intentionally blank’ (where subject matter no longer applicable) or adding additional new sections or bullet points (where additional information is to be included)

Date of amendment	Section & Bullet point number	Description of changes
31.10.24	10.7	ATTENDANCE OF MEMBERS/NON-MEMBERS AT GROUP MEETINGS, Dogs: Paragraph deleted pending further investigation.
21.01.25	5.3	SETTING UP A GROUP: New paragraph concerning naming and changing the name of a group.
21.01.25	7.3	RUNNING A GROUP, Beacon: Paragraph extended to include initial responsibility for entering name of new group and/or later changing that name on Beacon.
21.01.25	11.7	BEACON: New entry regarding the use of Beacon for other than Ru3a business.
21.01.25	7.14	RUNNING A GROUP, Member Code of Conduct. New entry
09.04.25	10.7	ATTENDANCE OF MEMBERS/NON-MEMBERS AT GROUP MEETINGS, Dogs: Revised guidance on dogs attending meetings.
18.06.25	8.1 8.3 8.6	GROUP FINANCES. Additional information added. Best practice for collection of monies Additional information added. Suggested action if large sum of money builds up in group finances. New entry. Summary of best practice for handling group finances.
17.02.26	7.2	RUNNING A GROUP. Group self advertising. Amendment. Reference to Showcase boards at the monthly meetings removed.
17.02.26	8.7	GROUP FINANCES. Donations to other charities. New entry
03.08.26	5.4	SETTING UP A GROUP. Start-up grants for new groups
03.08.26	10.5	ATTENDANCE OF MEMBERS/NON-MEMBERS AT GRP. MEETINGS. Information regarding Carers. (Additional Sentence)