

Durham & District u3a Policy for Groups

1. General Principles

- 1.1 Durham & District u3a (D&D) actively encourages and supports interest groups for the enjoyment of members. This policy sets out how each group should be run and managed.
- 1.2 Each group should have one or more designated group leaders. These persons should be made known to the D&D Groups' Liaison Officer as should any changes.
- 1.3 D&D subscribes to the u3a ethos of mutual aid and that the interest groups should be run 'by the members for the members.' It follows that the engagement of outside, paid tutors or instructors is not encouraged. Any group that feels it needs to follow this path should seek advice from the D&D Groups' Liaison Officer, and if necessary, make application to the committee for an exemption.
- 1.4 Group leaders should endeavour to ensure that meetings are accessible to all members e.g., wheelchair users. It is accepted that this might not always be possible, for instance when visiting historic buildings. The same principle applies to groups that choose to meet in members' homes if this means that a prospective member will be excluded. In such circumstances, consideration should be given to meeting in a more accessible venue.
- 1.5 Group leaders should devise a suitable way of communicating with their members. D&D strongly encourages the use of Beacon as the most secure method – although Beacon can be supplemented if required, and by agreement with group members, by another method such as WhatsApp, where a quick response is required.
- 1.6 We also strongly encourage group leaders to keep a record of members and to regularly update calendar details on Beacon. Training can be arranged, if required. Anyone using the website to obtain calendar details is linked to the data on Beacon; Beacon and the website are separate systems.
- 1.7 Any member is entitled to start up a new group. In the first instance, advice should be sought from the D&D Groups' Liaison Officer. A small 'pump-priming' grant may be available, if necessary, upon application to the committee.

2. Health and Safety

- 2.1 Where a group meets in commercial premises, group leaders are entitled to rely on the Health and Safety assessments that such businesses are required to undertake. Nonetheless, group leaders should always be aware of potential hazards, for example, spillages.
- 2.2 No formal assessment is required when meeting in members' homes but group leaders should, nonetheless, be aware of any potential hazards, for instance, too many people crowded into a small space.
- 2.3 For physical activities, different considerations apply, and group leaders are

Strongly advised to read the guidance on the u3a website. For example, walk leaders should always check the route to be sure of the suitability of the walk or be prepared to suggest an alternative.

- 2.4 The bottom line is that members are responsible adults who should assume responsibility for their own safety insofar as it is in their power to do so. Group leaders are not required to enquire into the health needs of their members.

3. Finance

- 3.1 Some groups do not have any involvement in financial matters. Others need to charge fees in order to cover items such as room hire. Where this is the case, group leaders should keep a record of attendees and amounts paid as well as expenditure. In principle, all groups are intended to be self-funded.
- 3.2 It is the D&D u3a policy that group leaders should not hold balances in excess of £100. They should endeavour to keep within this figure, for instance, by offering free weeks from time to time. If any group feels that this figure will not meet their needs, they should make application to the committee for a revised figure.
- 3.3 No group leader or member may use a personal bank account as a vehicle for management of the groups' finances.
- 3.4 No group may have a bank account separate from the D&D bank account. If any group needs banking facilities, they should apply to the treasurer for advice.
- 3.5 At the end of each financial year, the treasurer will need details of financial activity including on-hand balances. The treasurer will require details of all fees collected and all payments made and a statement of the on-hand balance at the end of the financial year. Group leaders should also forward any receipts for payment to the treasurer.
- 3.6 Group leaders are reminded that there is a ledger facility in Beacon and they are encouraged to use this to help keep track of their finances. This makes the year-end requirements easy.
- 3.7 Group leaders are also reminded that any monies that they hold form part of the D&D financial assets. Excess balances can be paid into the treasurer at any point during the year.
- 3.8 If any group needs new or replacement equipment for its activities, application should be made to the committee who may authorise purchase. Such equipment forms part of the assets of the D&D u3a and, as such, may on occasion be used by other groups. No attempt should be made to raise money for such needs from group members. The group leader is responsible for the safe storage and operation of such assets.

Approved: April 2024

Review: April 2027