

## Hucknall & District u3a Guidance Notes for Group Leaders

### Introduction to Interest Groups

Thank you for agreeing to organise an interest group. We are sure you will find it very rewarding. It is often said that interest groups are the life blood 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. Learning is by the members, for the members.

**These notes are intended to give general guidance and if you have any concerns or need advice, please contact the Groups' Co-ordinator.**

### Membership Administration System – Beacon

Hucknall & District u3a (hereafter 'the u3a') uses the Beacon Data Management System. Leaders are encouraged to make use of this facility to contact members. Anyone newly appointed as a Group Leader on Beacon must contact the Beacon Administrator to arrange appropriate training.

Why Use The Beacon System?

- Personal data is secure and encrypted.
- Details of group meetings are there for all Group Members to see via the Portal.
- E-mails to Group Members are automatically sent securely without disclosing everyone's email addresses.
- E-mail with attachments and/or links are less likely to be blocked.
- Transactions can be entered on the Group Ledger by Leaders.
- Passing on Leadership is made easier.

Refer to the Leader's Guide To Beacon for detailed instructions. Contact the Beacon Administrator for further information ([beacon@hucknallu3a.org.uk](mailto:beacon@hucknallu3a.org.uk))

### Non-Beacon Communication

Group Leaders are strongly recommended to use Beacon to contact group members as this is the most secure method.

If this is not used, Group Leaders MUST use the BCC facility to maintain security of member's addresses etc. This facility will ensure compliance with GDPR and is available from all e-mail providers.

## Data Protection

'Personal Data' means any information relating to an identifiable person:

Name, Address, Email Address, Telephone Number and Image.

1. Personal data **must only** be used for u3a business to contact members concerning u3a business.
2. Data disclosed outside the u3a organisation must be limited to essential data and disclosed **only with the owner's permission**.
3. Passwords must be kept securely and secretly and not shared.
4. Ensure that personal computers are free from virus and malware by using appropriate virus protection software.
5. Computer files containing personal data should be password protected and encrypted.
6. If there is a data breach report it to the u3a Committee Officials immediately.

## Register of Attendance & u3a Membership

Group Leaders are encouraged to keep a register of attendance.

They should check that members of their group are valid members of the u3a. The simplest way to do this is by using Beacon.

Except as noted below, individuals who are not members of Hucknall u3a, are not permitted to attend group meetings. The exceptions to the non-member rule are:

- Individuals who are contemplating joining the u3a can attend for one "taster session" (see attached Temporary Membership Form)
- Members from other u3as in the Nottinghamshire area can attend a group, if there is space, with the Group Leader's permission. However, they should first become an Affiliated Member of Hucknall u3a.

## Financial

Groups should be self-funding.

Incidental expenses incurred by Group Leaders may be reclaimed from the group's reserves by submitting an Expenses Claim Form to the Treasurer.

(The form is appended to this document).

## Health & Safety

Members must accept personal responsibility and are required to act in a manner which does not place at risk the health or safety of themselves or others. Some group activities are inherently more dangerous than others.

All Group Leaders are required to do Risk Assessments, which are appropriate to their group. They should be reviewed as and when necessary.

Risk Assessment checklists, which may offer some guidance in this regard, are available on the Hucknall u3a website.

Members who have concerns regarding personal safety should raise the issue with the Group Leader or Business Secretary, as most appropriate, as soon as possible.

Accidents must be reported as soon as possible in accordance with the Risk Management Policy. (The Accident Reporting Form is appended to this document). Copies of the Accident Form should be sent to the Business Secretary, Injured Member and Group Leader.

## Insurance

The u3a carries the following insurances:

- Public Liability Insurance
- Equipment Insurance, whilst stored at a member's home and at other premises if it is kept in a locked cupboard or room when the premises are not in use by the u3a.
- Home insurance for damage to the property of any member whilst their home is being used to host a u3a event.
- **NB: The u3a does not carry personal injury insurance.**

## Copyright & Performing Rights

The u3a holds the following licences. Please ask the Group's Co-ordinator for advice if any of these apply to your group:

- Copyright Licensing Agency to cover modest reproduction of copyright material for u3a use only.
- PPL PRS Ltd to play music in public.
- Motion Picture Licensing Company Ltd to permit audio visual content to be screened in public.

## u3a Policies

Several u3a Policies appear on the Hucknall & District u3a Website and Group Leaders are encouraged to acquaint themselves of the content of these.

## Hucknall & District u3a Expenses Claim

Claimant Name .....

<u>Date of Expense</u>	<u>Item</u>	<u>Purpose/Details</u>	<u>Amount</u>	
			£	p
<b>Total Claimed</b>				

Signed by claimant ..... Dated .....

Please attach supporting receipts to claim form where possible

## Hucknall & District u3a - Accident Reporting Form

<b>Description of Accident</b>	
<b>Date of Accident</b>	<b>Time of Accident</b>
<b>Location</b>	
<b>Name of Member(s)</b>	
<b>Name and Address of non-Member(s) if applicable</b>	
<b>Witnessed by Address(es)</b>	
<b>Telephone Number(s):</b>	
<b>Injury Details</b>	
<b>Action Taken</b>	
<b>Outcome</b>	

Completed by ..... Dated..... Tel. No:.....

**Copies should be sent to the Business Secretary, Injured Member & Group Leader**

# Hucknall and District u3a

## Temporary Membership Registration

Temporary members are accepted at Hucknall & District u3a Social Events and Interest Groups, as agreed by the Committee, and implemented by the Group Leaders. For administration purposes the u3a have defined such individuals as Temporary Members. A one off fee of £1.00 is payable for such membership and it affords no other benefits. To assist the running of Interest Groups containing Temporary Members, it is necessary to collect and store 'personal information', that is information that could identify or relate to the identification of an individual. Personal information will be safeguarded in accordance with the u3a's Privacy and Data Protection Policy, which is available from the u3a website at <http://www.hucknallu3a.org.uk/policies>.

**Personal Information:** If you consent to the u3a storing and using your personal information in accordance with the above, please provide your details below.

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## Applicant

Name:

Address:

Phone:

email:

Signed:

Date:

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## Event

Group:

Event Detail:

Date:

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## Group Leader

Name:

£1 Fee Received (to be retained by the Interest Group).

Form to be retained by the Group Leader for 3 months.

Signed:

Date: