

Preston and District



INTEREST GROUP LEADERS'

HANDBOOK

Updated 2024

Recent Amendments:

Copyright & Recording policy Page 19

Group Name _____

Group Leader's Name

PASSWORD FOR MEMBERS AREA ON WEBSITE. User Name: xxxxxxxx Password: xxxxxx

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INTRODUCTION

Thank you for volunteering to lead an interest group. This Handbook offers guidance and support and provides the protocols and procedures for running an interest group.

Interest groups are the 'life blood' of u3a. Group Leaders play a vital role in management and communication within the Branch. We want to support you and draw on the experiences and practice of previous Group Leaders, here in Preston and many u3as nationally. The document incorporates advice from The Third Age Trust. The Third Age Trust is the national representative body for u3as in the UK.

INSURANCE

The Third Age Trust (TAT) does **NOT** provide personal accident insurance cover.

TAT does provide Third Party Liability (Public Liability) insurance to members. This cover is part of the Capitation Fee Preston u3a pays for each of its members to TAT. All venues we use have to have by law public liability cover, there is no personal accident insurance cover

THE INTEREST GROUPS' CO-ORDINATOR ROLE

The Interest Groups' Co-ordinator is a member of the u3a Committee. Their contact details can be found on the Contact Page of the Website.

The Groups' Co-ordinator 's responsibilities are to:

- Timetable the interest groups.
- Before setting up a new group email the committee with the proposed name and overview of the group purpose.
- Provide an induction for the new group leader. Including getting relevant forms signed i.e. Publicity Permissions, Data Protection, & Group Leaders Acceptance to abide by Committee Decisions
- Provide support for new and existing groups and canvassing for new Group Leaders and group members.
- Liaise with the Committee.
- Liaise with the accommodation provider, book and cancel accommodation where necessary and advise group leaders that the session has been booked/cancelled. ▪ Advise Web Administrator of any new groups or when the leader changes or any of the leaders contact details change. Also advise the Beacon Administrator who will update the details on Beacon

When appointing a paid tutor, the Co-ordinator will obtain the tutor's name, postal address, email address, telephone number (including mobile), NI number & UTR (unique tax reference) together with a copy of their insurance that covers the activity they are providing. This information should be passed to the Committee Treasurer.

THE INTEREST GROUP LEADERS' ROLE

In each group there will be one person who takes on the central role. The Group Leader must be a u3a member.

The Group Leader's responsibilities are to:-

- To work collaboratively with the Interest Groups' Coordinator.
- Advertise the group and its activities through emails to members via Beacon also the Weekly Newsletter and the Website. **Guidelines:** Give links to your webpage where possible, this should encourage members to look at your group page. A paragraph, two at the most should be sufficient.
- To facilitate communication between the Committee and the members, especially for those not on email.
 - Complete the attendance sheet and deal with the Group attendance fees or delegate responsibility to a group member. All money should be handed over no later than the Monthly Meeting following the group meeting – If this is not possible then the Group Leader should contact the Treasurer.
 - Guide the Group through its meetings.
 - Ensure that responsibility is shared within the Group. Members should be encouraged to take an active part in the Group.
 - Keep control of the session in respect of both timing and content.
 - Encourage a member familiar with the subject to help another less experienced member. ▪ Consider delegation within the Group where you can – to spread the workload, consider appointing a Deputy Group Leader.

If you have any problems with running your Group, then please let the Interest Groups Co ordinator know. Unless the Committee is aware of a problem they are not able to do anything to resolve it.

Managing Group Finances

- Members, including Group Leaders must sign in using the attendance sheet in the Green Interest Group File. This is kept in St Cuthbert's Admin office. Those Groups that meet at a Satellite venue can download the attendance sheet from the Links Page on the website. There is an attendance sheet, with instructions for completion in Appendix 2. ▪ Collect the Group meeting fee.
- All members pay the Group fee, **including the Group Leader.**
- Complete the bottom of the attendance sheet and detach the slip, and choose one of the following paying in methods: -

Issuing a cheque: Groups Leaders retain the cash from their Group meetings and issue a personal cheque for the same value made payable to **Preston and District u3a**. Put the cheque and slips in the red tin in the u3a drawer at St Cuthbert's or hand the cheque and slips in at the Monthly Meetings or send the cheque and slips by Royal Mail to the address shown on the bottom of the slip.

BACS: Request Preston and District u3a bank details and instructions by email from the Assistant

Treasurer - currently Margaret Clark mic0802@live.co.uk who will then email them to you.

Paying money in at a Lloyds Bank: On request, you will be issued with a paying in book by the Assistant Treasurer, (currently Margaret Clark) together with a set of instructions.

Note: The paying in book must only be used for your Interest Group as the paying in slip numbers will be recorded by the Finance Team as being for your specific Interest Group.

Cash: You must **NOT** put money in the red tin at St Cuthbert's, as this could result in St Cuthbert's withdrawing their consent for leaving cheques in the red tin. As a last resort, Group Leaders can continue handing the Group slips and funds over at Monthly Meetings, but no coins less than 50p.

Note: Whichever method you use it is important that the bottom section (slip) of the attendance sheet is fully completed. It is recommended that the Group Leader or an appointed assistant counts the cash during the meeting break, that way if there are any shortages they can possibly be sorted out before the end of the meeting.

Guest/non-member Attendance information slips. Blank forms & envelopes are stored in the back of the green folder. Completed forms should be placed in a sealed envelope marked non branch members, and placed in the red tin in the office.

Incurring Expenses

For expenses over £10 and less than £50 a written request to the Treasurer for authorisation must be made **prior** to making any purchase. If the cost is likely to be over £50 you must make an application for funding to the Committee by completing the application form - **Appendix 1**.

Group Organisation

- Any social activities undertaken by Interest Groups must be funded by the individual members e.g. social outings, refreshments at the end of a walk or lunch.
- Make sure you have sufficient promotional information for potential Group members to make an informed choice as to whether they wish to join the Group, (particularly important for physical activity groups).
- Group Leaders should make members aware that they undertake physical activity at their own risk: If they have been diagnosed with a health condition or are concerned about their ability please ask them to discuss with their GP to ensure that they are fit to undertake any u3a physical activities e.g. walking, line dancing, keep fit etc.
- If you provide written material with the u3a logo, make sure it has been approved by the Committee in the first instance.
- Do not breach copyright rules when photocopying or recording material **Appendix 7**
- Use the resources available from The Third Age Trust (TAT) i.e. The Resource Centre: Tel: 020 8315 0199 resource.centre@u3a.org.uk
- Use the Members' Area of the TAT website to download documents.
- Contact the subject advisors – see TAT website- www.u3a.org.uk
- All members must: Abide by the Principles of the u3a movement.
 - Always act in the best interests of the u3a and never do anything to bring the u3a into disrepute.
 - Abide by the terms and conditions of the Preston and District Constitution.
 - Treat fellow members with respect and courtesy at all times.

- Comply with and support the decisions of the Committee.
- Advise the Committee of any change in your personal details.

Potential Problems Within The Interest Group.

- Members not paying attendance fees.
- Disruptive or unsocial behaviour.
- Poor timekeeping and spasmodic attendance in particular when there is a waiting list to join the Group.
- Disagreement between members

Often the Group Leader can resolve difficulties informally and amicably. If this fails and the problem persists refer the matter to the Groups' Co-ordinator or a Committee Officer. ▪ If you experience a serious problem during a session, it is acceptable to ask a member to leave, but contact the Groups' Co-ordinator at the end of the session.

- Group Leaders should **not** have the authority to permanently exclude a member from the Group. You should contact the Group Coordinator, who will in turn contact the Chairman for them to assess the situation, and advice on an appropriate course of action.

POLICIES & PROCEDURES

Full List of Policies are available by selecting the Policies tab on the website

Health & Safety

Don't forget to point out the emergency exits and the assembly point, as well as the location of the toilets, at the start of any indoor meeting. We are required to do this by law. If there are new members present, take a little more time over this.

More in depth information is available from Third Age Trust Website – see **Appendix 4**

What to Do If There Is an Accident, Emergency Etc.

- In the case of an accident please follow the procedure provided for the venue. □
St Cuthbert's procedure is in the front of the Green Folder.
- Satellite venues will have their own procedure. Before using a Satellite venue, Group Leaders should identify with the Interest Group Coordinator the location of Health & Safety procedures and Accident forms. The form should be completed in the event of an accident for the venue they are using and for Preston and District u3a. The u3a Accident Report Form must be forwarded to the Secretary **Appendix 5.**
- **Appendix 4** explains how to access Advice Sheets.
- The British Red Cross provide a free First Aid App for smart phones which reminds you of the basics actions to undertake in common emergencies. Members with Smart phones can download the App using their smart phone. Once the app is installed the data is saved on the phone and can then be used without an internet connection.

Note any potential hazards in the room e.g. trailing wires and make a visual risk assessment before people start milling around. Arrange the furniture carefully to reduce the risk of people tripping over cables.

When lifting, again make a visual risk assessment to see if the task requires more than one person. To reduce the risk of injury with the manual handling of small but heavy objects, bend your knees and keep your back straight when lifting

Make sure any equipment is switched off at the mains and unplugged before making adjustments e.g. connecting speakers to an amplifier unit or the projector to a laptop computer.

Try to become aware of any medical conditions members of your Group might have by asking if anyone has a medical condition to let you know and to let you know what to do in the event of difficulties.

Examples of such conditions might be asthma, allergic reactions, epilepsy or diabetes. If in doubt phone for an ambulance or get the person to casualty as soon as possible.

Maintaining a Record of Group Members

In May 2018 the branch adopted the Beacon Management system primarily for maintenance of the membership database. It is now the preferred method for emailing members. There is no longer the need for group leaders to keep lists of members' details. Emails to group members should be sent using the Beacon System - Group Leaders are offered training and support using Beacon. The main benefits of using Beacon is that it is GDPR compliant, members contact details are always up to date, and it is easy to identify if anyone attending the group is a branch member. Also useful for identifying members who have not renewed their membership as their names are listed in red text. Their names can then be removed by pressing the remove icon at the left hand side of the screen.

- Ensure everyone attending is a member and always check new faces.
- If a member stops attending, try to find out why.
- If a visitor is 'sampling' u3a they can attend Group meetings and or events, but they **must** pay the normal Group attendance fee. They must also complete a "visitor attendance form".
- Visitors from other u3as can attend 2 Group Meetings or Events, after which they will need to become a member. They must pay the normal Group attendance fee and complete a "visitor attendance form" form.
- If the meeting is an outside event i.e. cycling, walking, etc. any non-members will need to complete a "visitor attendance form" Leaders need to ensure they have blank forms with them.
- If a member from another u3a wishes to join a Group regularly they **must** become a member of Preston & District u3a, paying the Preston and District Branch annual fee minus the capitation fee paid to The Third Age Trust.
- It is important that 'visitors' contact the Group Leader, before attending to request permission and to ensure capacity.

Satellite Venues & Home Groups

If the new Group is likely to have less than 12 members, you should consider holding the meetings

in a member's home until attendance numbers increase. If you are using a satellite venue i.e. using rooms other than those offered at St Cuthbert's

- Do not sign a rental agreement – pass it to the Committee who will manage the process. The Treasurer will make the payments on the Group's behalf.

Cancelling an Existing Room Booking

- If a session needs to be cancelled for whatever reason the Group Leader should contact the Interest Groups' Co-ordinator ASAP who will cancel the accommodation booking. Providing 7 days' notice is given u3a will not be charged for the room hire. In general if sufficient notice is not given a cancellation fee is charged.
- Group meetings in August - if your Group feels it would be appropriate to cancel your meetings then contact the Interest Groups' Coordinator in advance and they will cancel the room.

Booking an Additional Session and/or Additional Room

If you want an extra session the Group Leader should contact the Interest Groups' Co-ordinator ASAP. Who will then contact the venue provider to make the arrangement and advise the Treasurer that an extra session has been booked. This is providing sufficient members are going to attend to cover the cost of the room hire.

Organising Events Which Incur a Cost

Before incurring expenses (other than incidentals) you must request written authorisation from the Committee by completing the application form for applying for Group Funds/Expenses. For example, speakers for an event or group meeting see **Appendix 1**

When collecting money from members:

- Give receipts when they hand over cash/cheques
- **DO NOT** put members' event monies into your personal account without issuing a cheque for the same value made payable to Preston & District u3a
- All monies received from members must be passed to the Assistant Treasurer ▪ Obtain an invoice for any expense/cost incurred; the Treasurer will issue a cheque for the expense/cost if more than £10

Group Outings & Interest Groups that are Outdoors

- It is advised that one of the party should carry a **FIRST AID KIT**
- Try to make sure there are at least **TWO CHARGED-UP MOBILE PHONES** with plenty of credit.
- The Third Age Trust advises that a list of all travellers be left with a member of the Committee who is not travelling, so that in the case of an accident, someone holds a comprehensive list. The Group Leader or the Event Organiser should compile this list when collecting the booking fee to include: A Mobile phone /contact number for the member attending the outing plus the Name of the person to be contacted in case of emergency.
- All Group members should be given the contact details of the Event Organiser in case a Group member finds at the last minute that they aren't going to be able to make the outing or is going to be late for a visit. They should contact the Event Organiser to advise them of the fact, rather than delay the Group outing.
- All members and guests should carry ID with them e.g. a bus pass or preferably a u3a medical

card which gives next of kin, relevant medical conditions and home contact details. u3a cards can be obtained from the Interest Groups' Co-ordinator or Chairman.

- The Outing organiser should arrange for a Committee member on an outing by outing basis to hold a list of members who are on day outings in case of incident/accidents. The Outings Organiser must also have the contact details of the nominated Committee member.
- First Aid Kit – where groups such as walking, cycling and bird watching, which meet outdoors and/or are in a location that does not have a first aid provision, Preston & District u3a will provide the Group with a First Aid kit which should be carried by one of the members on each outing. It is the Group Leader's responsibility to replace any items used from the First Aid kit as soon as practical. Any cost will be reimbursed by submitting an expense claim form to the Treasurer.
- If a u3a member who is on a trip has to go to hospital the Outings Organiser is not obliged to go with them. However, they should inform a friend or a relative on the member's behalf in the event of an incident/accident.

Organising & Costing an Event

In the first instance complete an application for funding form **Appendix 1** and download the "Organising and costing an Event" document from the u3a website – Policies – Procedures.

Organising & Costing a Coach Trip

In the first instance complete an application for funding form **Appendix 1** and download the "Organising a Coach Trip" document from the u3a website – Policies – Procedures.

Changing Dates Times etc. of Events/Outings already advertised

If Group Leaders or Event Organisers wish to make changes to any event already advertised please Email the Events Co-ordinator before making any changes.

Updating Your Interest Group Webpage

We encourage Group Leaders to do this, or get another member of your group to do it for you. You will need your own Login Details. The Website Administrator will supply you with them. See **Appendix 3** for details of how to amend your page.

COMMUNICATION

Weekly Newsletter: You can email information about your Group to the Editor using the link from the welcome page on the Website. Please be brief and where possible direct members to your group page to obtain more information.

The Weekly Newsletter is emailed out to ALL members who have provided an email address. Printed copies (for the week of the monthly meeting) are available at the Monthly Meetings for members who do not have an email address. Spare copies are put in each of the Green Folders available at each Group meeting at St Cuthbert's.

The Good Times Magazine is produced twice a year and handed out at the April and October monthly meetings.

Spare copies are kept in the u3a cupboard in the Office at St Cuthbert's. The key for the cupboard is kept in the plastic drawer which is sitting on top of the cupboard. It would be appreciated if Group Leaders would check with their Group Members that they have received their copies and offer to get one from the office if they have not received a copy.

If you have ideas/suggestions for how to improve Preston and District u3a, then please email the Groups' Co-ordinator who will forward them to the Committee.

The Committee members can be contacted by email using the link from the contact page on the Website.

If you have a problem/query then contact a Committee member, unless we are aware of a problem we cannot do anything about it.

Help with communications for those we do not have email access. Those members who do not have access to the internet are increasingly being dis-advantaged.

- If they do not go to the Monthly Meetings or attend regular interest group meetings they do not get the Weekly Newsletter.
- If they do not have access to the U3A website, they may also miss out on information.
- With this in mind we are looking for members who are willing to help these members with communications.

Are you willing to help members who don't have an email address? These members often miss out on what is going on. Suggestions for how you could help:

- If a member lives in your road or nearby you could deliver printed information to them.

GENERAL INFORMATION

- **u3astorage cupboards at St Cuthbert's** – U3A have a cupboard in the Lindisfarne room and another in the office which stores forms, Good Times Magazines etc. The keys for both these cupboards are in the plastic U3A box that is on top of the cupboard in the office.
- The key for the external cupboard leading to the u3a cupboard in the Lindisfarne is usually unlocked, but if not then speak to the St Cuthbert's key holder and ask them to unlock it.
- **Equipment needing attention** – if when you use an item of equipment you find it is in need of repair advise the Vice Chairman who will then contact the appropriate person to get it sorted. Please consider the Group/person that may need to use the faulty item after you, and report the problem promptly.
- Our u3a Branch has a User representative (usually the Chairman) at St Cuthbert's Management Committee meetings.

- Some Interest Groups pay higher attendance fees, this is to cover the extra costs they incur e.g. external tutors.
- The Committee realises that, due to the nature of the membership, the summer months have a lower attendance. It is worth considering whether to cancel your meetings for these months. See the Policies & Procedures section - Cancelling existing room booking
- It is important that Groups aim to become self-financing.

Finally, if you have a problem/query then contact a Committee member, preferably by email

Unless we are aware of a problem we cannot do anything about it

See <https://prestonu3a.org.uk/Members-area/> for additional forms and documents

Appendix 1



APPLICATION FORM FOR FUNDING FROM COMMITTEE

Last updated 1st November 2019

Applications for less than £100 could be authorised by the Secretary and Treasurer. Any requests over £100 would need committee approval. Any funded events should be opened up to ALL the membership.

Your Name:

Name of Group Leader or Event Organiser:

Name of Interest Group if funding is for an Interest Group

Title of Event:

Date of Application: **Total expected expenditure**

If funding is required for a speaker what is the Speaker charging

Cost of room hire, and name of room.

Please list any additional costs

Other than a special event attendance fee would normally be £2.50. How much do you propose to charge your membership for attending?

Do you require any Sound & Vision Equipment?

Please email the completed form to the Treasurer philmeg@blueyonder.co.uk

For committee use

Date Group Leader/Applicant informed Date discussed by Committee Decision

made with reasons:

Preston and District u3a: Meeting Attendance Register Appendix 2 Interest Group / Event:

_____ Date: ___/___/_____

	Name	Mem No.	Pd .
1			
2			
3			
4			
5			
6			
7			

8			
9			
10			

	Name	Mem No.	Pd.
11			
12			
13			

14			
15			
16			
17			
18			

19			
20			

If you are a u3a member from another branch or a non u3a member you will need to complete a separate form. The Group Leader or Organiser will give you a blank form

	Name of non u3a member)	Paid
1		
2		

	Name of visitor from another u3a	Paid
1		
2		

----- Group Leaders: please cut here -----

Group/Event Name _____ Date: __/__/__ Making payment electronically Y/N

Did St Cuthbert's provide any photocopying Y/N If so how many

Totals: Preston u3a Members ____ Guests: ____ Non u3a Mems: ____

Cash Collected: £ _____ Expenses (maximum £10) £ _____ Cash to Treasurer: _____

Group Leaders MUST attach an invoice for any expenses claimed

Event Organiser/ Group Leader's Signature: _____

Ensure you have completed the form including circling the method of payment

Cheque made payable to Preston and District u3a. Put the cheque and slip (invoice for any expenses attached) in a plastic bag and place in the box in the drawer in the office at St Cuthbert's or hand it in at the next monthly meeting, or post: 68 Marsh Lane, Longton, Preston PR4 5ZL

Cash Put the money in a plastic bag with this slip and attach any invoices for any expenses (maximum £10), hand it in at the next monthly meeting. **DO NOT LEAVE CASH IN THE DRAWER**

VISITORS TO PRESTON AND DISTICT U3A

To be completed by anyone attending a Preston & District u3a meeting who is not a Member

Name	Date:
Email (If no email please write postal address)	Telephone

Privacy statement

Please tick the box below to confirm that you are happy for us to use the data you have supplied to securely store your data as a potential future member of the u3a

If you would like your data removed from our list at any time, please contact the Chairman via the contact page on the website: <https://u3asites.org.uk/preston/contact> Tel: 01772 313008

Please put the completed form in a sealed envelope and place in the red box in drawer at St Cuthbert's or pass to Margaret Jones for safe keeping. Information will be used to assess the number of times the person attends without becoming a member. After 3 months the person will be sent a letter/email advising unless they become a member they will not be able to attend any further meetings.

Editing/Updating Your Interest Group Webpage

If you have any questions, please contact the Website Administrator via the contact page on the website.

Instructions for editing your group page are in the form of a pdf document saved on the "Members" page of the Preston u3a website. You can download and save this file by clicking on the link "Group Leaders Website Help File". There is also another downloadable document you

may find helpful depending upon your level of computer skills. This is called “Website Tips & Tricks”. Self Help is also available by Clicking “Find out more” on the Site Builder Home Page <http://u3asites.org.uk> then clicking the link for – “Complete Index” to open up links to Site Builder help files and related documentation.

These files are not available in printed format because they may need to be updated on a regular basis as amendments become necessary. In order to download these files, you will need the “Password Protected Area” Username and Password issued to you. If you haven’t got this, please contact the Interest Group Co-ordinator.

Please note this is NOT the same as your login for your group page.

We ask that you:

- Do not give the login name and password to anyone else. If you are about to take over as Group Leader, you will need to apply to the Website Administrator for your own login details.
- You edit only your own Group's page.
- Visit the Site Builder site at <http://u3asites.org.uk> and download and read the two documents:- **Privacy and Data Protection Policy and Terms and Conditions**. The local **Code of Practice for Using the Website** is in the following text below.

Code of Practice for Using the Website

The website is very high profile and it is important that we do not break Copyright Law or fall foul of the Data Protection Act. We must also ensure that we do nothing to compromise the Third Age Trust's charitable status or bring the Third Age Trust or Preston City Council into disrepute. Furthermore, we should abide by the Site Builder Terms & Conditions and Privacy & Data Protection Policy.

PLEASE NOTE:

- Do not infringe copyright. Make sure you have written permission for anything you copy/download.
- If you ask nicely and explain what u3a is and that the Third Age Trust is a charity, you might well be given Permission.
- Make sure you have written permission from anyone before putting their surname or contact details on the site.
- Do not identify individuals in any photographs.
- Make sure you do not make statements that a very sensitive person might find politically incorrect. If you are unsure, then ask the Chair.

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- Apart from u3a merchandise, do not use the Website for advertising Commercial Products or other organisations. However worthy a charity or organisation may be, we are unable to support all of them and if we were to support some but not others that would be considered favouritism and would create problems for us as an organisation so we choose not to support any of them.
- Do not place any password protected files on Group Pages without asking permission from the Website Administrator first.

- If you add or change an email address which is associated with the blue bird icon on a web page, please ensure that you send a test email via the blue bird so that you know it has been received correctly. Do not put email addresses on web pages, use the Blue Bird link or Inline email links instead
- The maximum number of images you can upload to your set of pages is eight. (Set of pages means main page plus any sub-pages)
- Do not upload any text that will become an archive of your activities or information. Information should be time limited and removed when it has reached the end of its useful life.
- The data usage of your pages should NOT be constantly increasing and you should review your content periodically and take action to prevent this.
- If requested to take remedial action by the Website Administrator, please comply within a reasonable time frame. If you need technical help and support, contact the Website Administrator or local sources i.e. another group leader, in the first instance. Do not contact Site Builder Support; they only deal with Website Administrators.

There is a wealth of useful information on the Third Age Trust website for you to access From the Preston & District u3a Website “Welcome” page, under links click “The Third Age Trust”

The Third Age Trust website will be loaded. Select the “Advice” tab. From the drop down menu, click “supporting your members”.

If you have already registered with The Third Age Trust log in here to access the members' area or, if you don't yet have an account, create one by clicking 'Don't have an account?' This is one of the choices listed below the Log in Boxes

Below are some examples of what you could find by selecting “Advice” followed by “supporting your members”

Here you will find a list of documents for example Copyrights, food handling.

Subject Advice

From the Third Age Trust Website, click Resources then scroll down to “Subject Advice” Here you will find useful information relating to various interest Groups.

ACCIDENT REPORT FORM -

U3A

Name of injured party or property owner/address/telephone number :

Name/address/telephone number of any others involved :

Date/ time of accident/incident :

Location :

Circumstances of accident/ incident

Injury/property damage details :

Name/address/telephone number of person/people involved in the incident:

Witnessed by :

1.

2.

Address :

Telephone number :

Immediate action taken :

Details of any specialised assistance required at the scene.

Was medical advice sought afterwards? If so give details.

Name of Group Leader/Convenor Telephone number.....

Signed(injured party/parties)

Signed (Group Leader) Date

From time to time problems and grievances will arise involving one or more members. Such instances are, happily, rare but when they happen it is important that a mechanism is in place to resolve them objectively. In such circumstances the Committee has a key role to play and to achieve a resolution of the issue the facts will be established by a sub group of Committee members who will then rule on the matter.

SHOULD ANY CONCERNS ARISE WITHIN OUR GROUP REQUIRING A COMMITTEE DECISION WE AGREE AS GROUP LEADERS AND ASSISTANTS TO RESPECT AND ABIDE BY THE DECISION OF THE COMMITTEE

To be signed by all Group Leaders and Assistants

Date _____

Scope of the Policy

This policy applies to the activities of Preston and District u3a. It sets out the requirement for our u3a to operate according to the terms of its Copyright Licences and determines the way published material in any format (paper, audio, video, streamed services etc.) can and cannot be used.

Why this Policy Exists

1. The Third Age Trust (TAT) holds “umbrella” Licence Certificates from the Copyright Licensing Agency (CLA) and the Motion Picture Licensing Company Limited (MPLC) allowing us to use in certain circumstances Printed, Audio and Video materials
2. These may be used when running Interest Groups or other u3a Events to enhance the interest and quality of presentations including for educational purposes.
3. It is imperative that the terms of these licences are not breached. Any breach of Copyright rules could lead to these licences being withdrawn from TAT which would have a serious, negative impact on the ability of TAT, u3a Regions and individual u3a’s to function.
4. TAT has held these licences for many years and we have always been subject to them in specific areas, such as it being forbidden to photocopy Copyrighted sheet music. However, the issue has become more prominent during the Covid-19 Pandemic as Interest Groups and our wider u3a have used Zoom and other Video Conferencing platforms to enable certain activities to continue.

General Guidelines for Committee Members, Group Leaders and Event Organisers

1. The “Record” facility on Zoom or any other video conferencing system must not be used. It should be switched off in “Settings”. Material from third party sources used in meetings are for use in that meeting only and must not to be recorded or distributed outside that meeting.
2. TAT/u3a activities are covered by our CLA Adult Education Licence. This permits the use of a wide spread of available information in various formats under strictly limited conditions.
3. The licence permits the photocopying, scanning and re-typing of extracts from books, journals and magazines published in the UK including the use of digital materials in PowerPoint Presentations.
4. With regard to publications general guidelines for copying are:
 - One complete chapter from a book
 - One article from a Journal/Magazine
 - A short story/poem from an anthology.
 - Reporting of a single case from Judicial Proceedings
 - 5% of a publication as a general rule
5. Photocopying of sheet music which is subject to copyright is not permitted and music groups which require such material must encourage members to supply their own. There are some music publication websites that offer free music.
6. When accessing material from the internet it must not be assumed that it is free to use as it only enters the public domain once copyright expires. Being accessible is not the same as being freely available for distribution.
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