



THE UNIVERSITY OF THE THIRD AGE

Horsley U3A

[www.horsleyu3a.org](http://www.horsleyu3a.org)

# Group Activities Handbook



March 2017

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# Horsley U3A: Group Activities Handbook

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# Horsley U3A: Group Activities Handbook

## 1. Getting Started

Thank you for agreeing to be a Group Contact, Convenor or Leader. Although the term 'leader' is used throughout this document the advice applies generally, whatever your role. The handbook has been compiled with the aim of making the experience more enjoyable and to help you avoid surprises.

New group leaders (whether of new or established groups) may like to start by:

- Finding out or clarifying what members expect of their group
- Discovering or checking the expertise in the group
- Reviewing the local and national support that is available to the group

It is then useful to consider sharing some of the organisational duties such as collecting subs, booking rooms, helping to organise a programme, ensuring that the group's web page is kept up to date and maybe writing an occasional article for the Newsletter.

## 2. Annual Reception

Each year we hold a Reception for all Group Leaders to which you will be cordially invited. The event is usually held in January and is primarily intended to thank Group Leaders for their work during the year and to share their experiences with each other.

## 3. Organising your group's activities

It is up to each group to decide how their group will be run. The group may decide to have a group leader who carries out the entire organisation for that group or the various tasks may be shared out within the group. Shared loads are usually more willingly born!

To comply with our Horsley U3A Constitution, it is necessary that activity groups keep a record of participants and manage any finances involved. If you have to, or wish to, limit the number of members joining your group please let our Group's Support team know. **Waiting lists are not encouraged.** There may be enough interest to set up another Group. The Group Support team will help you with this process..

There is no limit to the size of a group. There may be as few as 5 or as many as 50 members enjoying a common activity. However when numbers exceed 50, consideration should be given to forming a second group.

All group members should be encouraged to participate and contribute to the group's activities. However, as members age they may need help to partake in group

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activities. This help will usually be provided by the group members, co-ordinated if necessary, by the leader. Those leading any outings or organised group activities should ensure that participating group members provide them with appropriate emergency contact details. In the past there have been a number of incidents that could be classified as emergencies or near emergencies. In these situations it is prudent to have emergency contact numbers available.

**A note on paid tutors:** The National Executive Committee of the Third Age Trust believes that the argument for not paying tutors is very strong. However, in some circumstances such payments can be approved by the committee. See Appendix B

## 4. Recording group members' participation

As mentioned in section 3 above, it is good practice to keep a record of all those who attend group meetings. To be fair to all and for insurance reasons, all permanent members of an activity group should become members of Horsley U3A. Leaders are encouraged to check that all those attending their group meetings are Horsley U3A members. Non-members, (especially from other local U3As) are welcome to attend a few taster meetings but may not attend repeatedly. Where spaces are short, especially on an outing, priority should always be given to members of Horsley U3A. Ultimately, it is for the Group Leader to make sure that participation is enjoyed equitably. If in doubt about our Policies and their implementation, the Chairman or Secretary can give guidance

## 5. Accommodation

Many groups meet in the houses of their members, sometimes in rotation. For larger group meetings there are plenty of public meeting rooms in the area. These can be hired at very reasonable rates. For details see Appendix C

## 6. Equipment

Horsley U3A has its own laptop, projector, screens and display boards that can be used in any of the rooms of East Horsley Village Hall (or elsewhere by agreement). At the moment only three people have access to the booking spreadsheet, Tony Heaney, Richard Deighton and the Chairman. Nevertheless, the registered bookings can be viewed by opening the website "Resource Section" tab and clicking on the "Horsley U3A Equipment" option.

The equipment should only be removed from the cupboard on the day it is needed and if possible returned on the same day, or the day after. Keys to the Horsley U3A storage room and cupboard are held by only certain members. Current storage

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If you have any questions or suggestions concerning this guidance document please contact a member

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cupboard key holders: Tony Heaney, David Hewson, Ian Eversden, Bill Hewlett, Peter Tallon, Denise Smee, Margaret Faulkner, and Bob Spackman. Sue Mills holds keys to both the kitchen cupboards and second storage cupboard. Contact details are listed in the **Directory**.

## 7. Finance

Groups must aim to be self-financing. You might need to cover the cost of hiring a room or other running costs by charging members a small fee for each meeting. For regular meetings you might levy a charge to cover the costs of a season or the entire year. **A petty cash tin works best for most groups as it's easily passed on to the next leader or a stand-in when necessary and is perfectly adequate for small sums (up to £100 total)**. You may wish to keep some or all of the cash you have collected in your personal bank account for safety; if so, please inform the group members beforehand where their money is being held. However, do not use your personal bank account to hold more than £200 of U3A group money; make use of the U3A Social Account instead. If, rather than paying cash, your members wish to pay by cheque, it is not unreasonable to ask them to make their cheques out to you personally, and pay the expenses yourself.

**For more on finance see Appendix A**

## 8. Insurance

The Third Age Trust provides insurance for many aspects of our U3A group activities. The policy is set up to protect all U3A members, and includes 'member to member' cover so if somebody is injured undertaking a U3A activity and legal liability could be proven, the insurers would deal with any claim. Personal property loss will be covered by a member's own household insurance, but if such loss or damage is caused by an act of negligence or omission by the U3A, or any member (other than the member whose property it is), a claim could be made by the member against the U3A. Members partaking in holidays organised by U3A should take out their own travel insurance. Full details of and enquiries about insurance can be obtained from the Secretary (see Appendix D)

## 9. Letting the wider membership know about your group's activities

A brief description of your group activities and contact details appears in our **Directory**. In addition you are encouraged to contribute to our **Newsletter** which is issued twice a year. A membership wide e-mail can be sent to all members if you are keen to attract members to a particular meeting (contact the **Membership Secretary**). Alternatively, notices can be posted and literature displayed on the monthly meeting

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noticeboards and, if needed, announcements made at the monthly meetings. Notices for the public noticeboards need to be prepared in a particular way before being displayed. Contact Kelvin Hayes for more information. [meryl.hayes@tesco.net](mailto:meryl.hayes@tesco.net). There are also plans to issue a monthly News Bulletin.

A particularly powerful way of informing others of your group's activities is to use the **Horsley U3A Website**, see: [www.horsleyu3a.org.uk](http://www.horsleyu3a.org.uk). Each group is allocated at least one webpage if not more. Included on the page should be brief details about the group, who to contact for further information, where and when the group meets, and details of forthcoming meetings up to at least one year ahead. It is also possible for individual groups to set up their own web page, or even set up their own linked website. If you wish to add any information to the Horsley U3A site, please contact the website manager (see Appendix B). **Group Leaders are encouraged to keep their web pages interesting and up to date.**

## 10. Privacy

To encourage members to enquire about group activities, the telephone numbers of the Group Leaders are listed and displayed on local public notice-boards. To help communication within your group, you will probably share your e-mail address with your group members. We also encourage you to allow your e-mail address to be used on our website and in particular your group's web page. However, this can be avoided if you are concerned about privacy.

## 11. Learning

Learning is at the core of all U3A activities. There is undoubtedly a wealth of experience among group members and many will be keen to continue learning. There is also plenty of advice and experience available to help you incorporate learning into your group activities. In 2014 U3A National Office published a handbook entitled 'More Time to Learn'. Copies can be obtained from central office or from our Group Support team. <http://www.u3a.org.uk/members-area/onlineshop/handbooks/more-time-to-learn-detail.html> Leaders are also encouraged to read appendix B

## 12. Subject Support

All groups tend to thrive on variety and new ideas. Your group members are an important source of ideas and these can be supported using national and local U3A resources. These include:

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- i) **Group contacts/leaders in other U3As.** Most U3As list their groups on their website. Local U3As have groups similar to those in Horsley. Contacting the group leader through the website will allow you access to their activities past and present. In some cases our group leaders are already liaising with similar groups in other local U3As. Details of local U3A websites are listed in our Directory.
- ii) **U3A subject co-ordinators and networks.** By logging on to the national U3A website ([www.u3a.org.uk](http://www.u3a.org.uk)) as a U3A member, you will gain access to some helpful group focussed material and to specific subject advisors. Subject advisors offer “start up” leaflets, newsletters, telephone or e-mail consultations, etc.
- iii) **Online courses.** There is a wide range of on-line learning courses available. Most are free and allow those partaking to learn at their own pace and when they wish. These courses may be suitable for group participation. They can be found by going to *www.futurelearn.com*
- iv) **Podcasts** are becoming a popular way of downloading presentations that can be used as the basis for group meetings. The BBC has a wide range available and some group leaders are already using TED (Technology, Entertainment, Design) presentations.
- v) **Central U3A Resource Centre.** CDs and DVDs etc may be requested free of charge from this Centre. The catalogue can be viewed in the members’ area of the U3A website.

Logging into the National U3A website it is very easy.

Go to: <http://www.u3a.org.uk/home.html> All you will need to decide is a name and a password.

If none of these resources meet your needs please contact the members of our Horsley U3A **Groups Support Team**. (Appendix D).

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## Appendix A      More on Finance

Using the Horsley U3A Social Account.

You are welcome to use the Horsley U3A Social bank account for larger sums (payments by cheque for outings etc). In this instance cheques need to be payable to Horsley U3A.

Whatever the sums of money involved you should keep a record of all cheques received and payments made. This will help you sort out any problems with returned cheques, or if you need to refund any monies because an event has to be cancelled.

### Outings, Concert and Theatre visits

The charges you make for outings will need to cover all costs you incur directly as organiser, including entrance fees and coach or mini-bus hire if appropriate. Members should normally pay other travel and accommodation costs directly. Where you organise several outings or events in a year, you should aim to break even overall, any surplus from one event helping to fund the next. At the end of the financial year (which runs from 1st January to 31st December) you should disclose any cumulative loss or surplus of more than £100 sitting in your petty cash tin or personal bank account to the Treasurer. You will, however, be allowed to retain the surplus for use in the following financial year.

### Financing events/activities involving expenses in excess of £100

If a Group Leader has to pay for expenses in excess of £100 prior to the start of an activity (e.g. for advance booking for tickets, transport or advance block booking of a venue) the Treasurer may advance this sum:

- i) We recommend that the finances of any U3A event or activity are kept separate from your personal finances. Inform the Treasurer beforehand if you want his assistance with the finances of a particular event.
- ii) Ask the venue/ supplier to provisionally book the venue/ performance/ coach etc against an invoice made out to Horsley U3A for the total cost. Ensure the invoice is sent to the Treasurer [treasurer@horsleyu3a.org.uk](mailto:treasurer@horsleyu3a.org.uk) highlighting the due date by which payment is required in order to confirm the booking.
- iii) Confirm that a sufficient number of your members have signified their intention to participate, by giving you their cheques for their share of the expense concerned, made payable to Horsley U3A, by this due date. Ensure each cheque is signed and dated (NOT post dated). However do not bank the cheques until you are certain you have enough participants for the event to go ahead.. Do not ask your members for, and do not accept, any cheques made out to you personally.

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- iv) Confirm to the Treasurer when you have received a sufficient number of cheques for the event to go ahead. He will pay the invoice to the supplier and you should bank any remaining uncashed cheques.
- v) Horsley U3A banks with Lloyds Bank. The Treasurer will inform you which account the cheques should be paid into. If you are organising trips on a regular basis, the Treasurer may provide you with a pre-printed paying in book or pre-printed paying in slips to make payments.
- vi) It is important that you keep a written record of each individual member's payment as well as the total that you bank in this way. Alternatively, just hand cheques payable to Horsley U3A to the Treasurer for him to record and pay.
- vii) Events involving air travel or holiday bookings should be booked through recognised ABTA/ ATOL protected travel agents, airlines, or hotels. Participants' contributions should be paid by cheque or credit card direct to the supplier, not to Horsley U3A. For foreign travel, trip organisers should ensure that all participants have appropriate personal travel and medical insurance. Membership of Horsley U3A and travel in a group organised by Horsley U3A does not confer such insurance.
- viii) Some venues will only accept party bookings upon prior payment by credit card. In this case you may decide to pay this cost upfront using a personal credit card, but we recommend that you only do so if the venue will agree to refund you fully for the cost of any tickets you purchase in this way and subsequently return as not taken up by members. Having secured the tickets you should request that participating members provide cheques payable to Horsley U3A for their share in the usual way, bank these in due course, and then reclaim your net expenses (initial prior purchase less any returns) from the Treasurer. It is frequently possible to secure the booking by credit card, bank participating members' contributions, and secure payment from the Treasurer before you become liable for the credit card balance.
- ix) Group Leaders should price members' contributions for each event aiming to break even overall through the year, taking one activity or outing with another, rather than seeking to make a guaranteed surplus on each individual occasion.. The U3A has financial reserves accumulated from surpluses on previous activities which means that a shortfall or deficit can be tolerated on the occasional event in future.

Where you are organising a trip through a travel agent, your members should make their payments for the trip direct to the travel agent and not to you or Horsley U3A, to secure whatever ABTA/ATOL protection is available.

Remember to contact the Treasurer if you need to pay advance expenses of more than £100 prior to the inauguration of an Activity Group (e.g. for tickets, transport or a

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venue), as the Treasurer may be willing to advance this sum on the understanding that it will be repaid in due course from group members' future contributions. If an event is likely to appeal to or otherwise benefit the wider Horsley U3A membership, some central funding may be offered by the U3A Committee. For further guidance please contact the Treasurer.

## Car Sharing

Be aware that when members drive their own cars to an event and provide lifts for other members of the group, they could invalidate their car insurance if they are deemed to be "plying for hire" having asked for **or received** explicit financial contributions towards petrol and other costs. Therefore passengers should instead either offer the driver a coffee or some other future indirect reward, or return the favour at a later date and themselves offer a lift.

For any other enquiries concerning finance contact the Treasurer (Appendix D)

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## Appendix B Learning

### Encouraging a Culture of Learning

Learning has always been a key part of the U3A ethos. To engender this culture of learning, the Third Age Trust has issued 'More Time to Learn', a document that brings together all the available information and advice on the subject. Key phrases used include 'shared learning', 'an emphasis on active participation by all members of the group', 'learning by playing' and 'the purpose is to show the rest of the group how to do something, not merely to exhibit a member's own skill'

The method of learning said to be preferred by the U3A movement is essentially participative learning. It is self-directed, informal, and co-operative. Section 3 of 'More Time to Learn' gives plenty of detail about how participative learning can be organised and encouraged. Although learning can be individual, most learning will take place within the activity groups that form the core of any U3A. These groups arise from a common interest in a particular subject, pastime or activity with group members sharing and participating in the process of learning.

### Encouraging more 'Participative Learning'

Section 3 of 'More Time to Learn' offers advice on introducing and sustaining participative learning. In both East and West Horsley there is probably a higher than average number of university educated members. They have held positions of responsibility and are still keen to enjoy life to the full. There is no shortage of very able people but their enthusiasm for further learning is not always obvious. There is growing scope for further learning if members wish to take the time to do so. It is likely that the learning process will be different for each individual but it will undoubtedly be a combination of personal learning and learning with others.

### Personal Learning

There is a variety of courses available for individuals wishing to study. A few members may wish to take longer courses such as those that lead to a degree e.g. with the Open University. However, it is more likely that members will prefer to study for shorter periods. Such opportunities include evening classes, short daytime courses, and short on line courses. Some people prefer to study on their own and on line courses give them the opportunity of doing so in their own time and at their own pace. U3A offers online courses, and there is an attractive range of Massive Open Online Courses (MOOCs) available worldwide. In 2012 the Open University launched FutureLearn, partnering with more than 20 UK and international universities and other institutions such as the British Council, the British Library and the British Museum.

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Currently, we are encouraging Horsley U3A members to partake in FutureLearn courses. Individuals apply to partake in these courses and as far as U3A is concerned there is no obligation for them to share their newly acquired knowledge with others. However, the following might be considered:

- i) encouraging group members to share any learning they have acquired as a result of following an on line course.
- ii) using on line courses as a basis for group meetings.

## Learning in Activity Groups

There is already a degree of learning occurring in many of our activity groups. It happens in a variety of ways some of which are listed below and I am sure there are others:

- i) Group members share their knowledge and experience with others in the group
- ii) Tutorials are given by the leader and other group members.
- iii) Demonstrations of good practice are given by experienced members of the group
- iv) Visits to centres of excellence
- v) Invitations to guest speakers and guest tutors

Most groups benefit in at least one of these ways if not more. Listed below are some examples of learning being put into practice in some of our groups:

- a) improving members play / skill (e.g. table tennis, snooker, croquet, cycling, etc),
- b) creating better pictures (practical art and photography),
- c) writing up and sharing summaries of meetings and visits,
- d) investigating beyond the experience, preparing background information prior to meetings and visits, using podcasts
- e) making better use of the internet and other sources of reference , e.g. University libraries
- f) improving presentation skills

## Using Paid Tutors - TAT Advice

The Third Age Trust fully recognises that there are cases in a U3A where a substantial number of members want to engage in an activity where they are not willing to operate purely internally. In such cases we believe U3As should do the following and only consider the possibility of paid tutors when all else fails:

- i) Investigate involving members of another, reasonably local, U3A. This could be either to get the group started, or to contribute to it on a longer term basis. A

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member of another U3A cannot be paid a fee, but out of pocket travelling expenses would normally be paid.

- ii) Investigate if local provision for the Group already exists or could be made available under the auspices of a non-U3A organisation e.g. a local authority, commercial body, Age UK.
- iii) Investigate using expert non-member(s) to advise on the subject required for a few sessions. Some payment may be necessary.

The most practical option for some indoor physical activities such as Pilates etc. is to operate completely outside the auspices of the U3A. Activities organised by Universities, Colleges, Museums and other entities that are available to U3A members but are not part of U3A are surely welcome.

It is a key part of U3A ethos that costs of membership are kept as low as possible. Any additional costs that may arise from the above suggestions should therefore fall exclusively on members of the particular interest group.

Any group leader wishing to engage the services of a paid tutor, should first consult the members of our Group Support team. They may then refer the matter to the Horsley U3A committee.

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## Appendix C Rooms available for hire by U3A Groups

**East Horsley Village Hall:** A modern building having five rooms ranging in size from the Agnes Conisbee Room (25 people) to the Main Hall (180 people). There are excellent kitchen facilities and cloakrooms. For details of room availability and rates of hire **contact:** the Hall Manager, Tel. 01483 285019, [villagehall@easthorsley.net](mailto:villagehall@easthorsley.net) Website: <http://www.easthorsleyvillagehall.co.uk/>

**West Horsley Village Hall:** Three rooms ranging in size from Rubin (15 people) to Main Hall (100+ people) There are modern kitchen and cloakroom facilities as well as access for the disabled. For details of room availability and rates of hire, or a visit prior to booking either of the Halls, please **contact:** Mrs Ella Barber on 01483 285454 or email her on [whvhbooking@gmail.com](mailto:whvhbooking@gmail.com). For more detail see: <http://www.westhorsley.info/west-horsley-village-hall/>

**West Horsley Methodist Church**, The Street, W. Horsley. KT24 6DD: Wesley Room, Max capacity 40 people, £6 a session, no alcohol and no wi-fi. **Contact:** Bob Spackman 01483 283343 or e-mail: [bob.spackman@googlemail.com](mailto:bob.spackman@googlemail.com) <http://www.westhorsleymethodistchurch.org.uk/>

**The Wheelhouse**, 82 East Lane, WH.( £5.00 to £7.50 per hour). **Contact:** Pat Davies on 281898. <http://www.achurchnearyou.com/east-lane-st-mary/>

**Church Rooms at St Martin's Church**, Ockham Road South.

For more detail see: <http://www.easthorsleychurch.org.uk/for-hire/canterbury-rooms/>. You will need to complete a form: <http://www.easthorsleychurch.org.uk/for-hire/canterbury-rooms/room-hire.php>

**Effingham Community Hall**, Forest Road, Effingham Junction. **Contact :** Mrs Audrey Foxall on 283920. For more details see: <http://www.easthorsleychurch.org.uk/for-hire/community-hall/>

**Ockham Parish Room.** Ockham Parish Room and the Rovers Den are situated in the heart of the village in Ockham Lane and are one of the focal points of village life. Parish Room £7.50 per hour, Rovers Den £6.00 per hour, Parties £9.00 per hour, Concessions may be available for regular bookings. To obtain further details or to make a booking please **contact:** the caretaker on 01483 225 152 <http://www.surreycommunity.info/ockhamparishcouncil/useful-contacts/ockham-parish-room/>

**Rehearsal Room at Nomad Theatre.** **Contact:** 01483 284717  
<http://www.nomadtheatre.com/contact-us/>

**St Martin's Court:** one room (up to 8 people at around £5.00 per hour and must be vacated by 5.00pm). **Contact:** Manager St Martins Court Tel: 01483 444 249 <http://www.housingcare.org>

**East Clandon Village Hall:** £6.00 per hour or £35 per day. For bookings to hire the hall and equipment please **contact:** Bug Robertson, Tel: 01483 223751 e-mail: [bugrobertson@hotmail.com](mailto:bugrobertson@hotmail.com). For more detail see: [www.eastclandon.org.uk/village\\_hall.html](http://www.eastclandon.org.uk/village_hall.html)

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## Appendix D - Committee members and contact details 2017:

<b>Role</b>	<b>Name</b> <i>*non committee member</i>	<b>'Phone &amp; e-mail</b>
<b>Chairman</b>	<b>Ian Eversden</b>	<b>01372 456854</b> <b>chairman@horsleyu3a.org.uk</b>
<b>Treasurer</b>	<b>Richard Deighton</b>	<b>01483 285251</b> <b>rd@the-deightons.net</b>
<b>Secretary</b>	<b>Daphne Padfield</b>	<b>01483 282277</b> <b>secretary@horsleyu3a.org.uk</b>
<b>Membership Secretary</b>	<b>Bill Hewlett</b>	<b>01483 283635</b> <b>membership@horsleyu3a.org.uk</b>
<b>Groups Support</b>	<b>Denise Smee</b> <b>*Helen Bayes</b>	<b>01483 283542</b> <b>denisesmee@hotmail.com</b>
<b>Membership Support and Volunteers</b>	<b>Peter Tallon</b>	<b>01483 283163</b> <b>patallon@btinternet.com</b>
<b>Hospitality</b>	<b>*Sue Mills</b>	<b>01483 283657</b> <b>susanmills84@tiscali.co.uk</b>
<b>Speaker programme</b>	<b>*Jen Powell</b>	<b>01483 284136</b> <b>jen@powell.net</b>
<b>Events</b>	<b>David Lush</b>	<b>01483 280267</b> <b>davidlush46@hotmail.com</b>
<b>Media Services</b>	<b>Tony Heaney</b>	<b>01483 284347</b> <b>theaney@aol.com</b>
<b>Website Manager</b>	<b>*Mark Blowers</b>	<b>01483 281221</b> <b>mark@blowermk.plus.com</b>

If you have any questions or suggestions concerning this guidance document please contact a member