

Day-to-day Running of the Group

Attendance Register and Fees

You must keep a record of all expenditure and income from session fees and other income (see below) to assist with accounting procedures.

Use your attendance register to keep track of session payments. You can download a current list of your attendees from your Beacon group page, as a printable table

The attendance register should be available for the Treasurer to inspect on an annual basis, and all records will be retained for a period of 6 years. The register can be sent to the Groups Coordinator along with a brief report on the Group's activities during the year, for inclusion in the AGM documentation.

Where meetings are held in other public venues, you are still required to collect a nominal £1 per attendee to contribute to branch running costs.

A group leader running more than one group per month need only pay a session fee for one group.

From the total amount of attendance fees collected, you may take monies for routine expenditure (refreshment expenses etc). Details and receipts, if possible, of this expenditure to be shown for audit purposes.

The net, collected, monies should be passed on to the Treasurer once you have collected over £50, and you will be provided with a receipt for such payment - this receipt should be kept with the register, to assist with your accounting record.

You may pay in session fees using online banking, or in person to the Treasurer (for example, at the general monthly meeting). You are not recommended to retain more than £50 of u3a monies at your home address, as there may be insurance implications.

If, as group leader, you occasionally want to purchase material assets for Bolton u3a, which include items for start-up or replacements, where the cost is likely to be more than £25 then you must seek permission from the committee or group leaders' co-ordinator beforehand.

Approval of the purchase is unlikely to be refused and will be recorded in committee minutes. The items will also be added to the Bolton u3a asset register.

Consumables used by group members for their personal use and retention must be paid for by the members themselves.

Incident Reporting

Should there be an "incident", happening during one of your sessions, whether it involves physical injury / damage or other, it is recommended that an 'Incident Report Form' be completed and submitted to the Committee via the GLC, detailing circumstances of the incident. A specimen form is at Annex B.

It is recommended that you ask your group members to tell you in confidence if they have individual health problems. Consult with the group coordinator if you need advice on how to meet the needs of any member with mobility, health or learning issues

Please contact the Group Leaders' Co-ordinator, should there be any difficulty or problem with the running of your Group. We are very appreciative of your initiative and willingness in becoming a Group Leader and remember that you will be given every encouragement and support in the running of your Group. As part of that support, twice a year there will be a Group Leaders' meeting at which you are given the opportunity to air your views and express opinions or concerns. In recent years this has taken the form of an awayday in February and a discussion group in September.

Guidance for Group Leaders

1. Ask to see the venue's risk assessment document and ensure your session adheres to it. All our nominated venues are risk-assessed. Should you become aware of a situation that puts members at risk, immediately inform duty staff in the venue and also tell Bolton u3a venues coordinator (venuescoordinator@boltonu3a.org.uk)
2. As group leader it is important to understand the venue's emergency procedures and establish the location of the emergency exits.
3. The group leader should also be aware of the venue's alarm signals, noting if there are different ones for fire, bomb threats, or intruders.
4. Confirm if fire alarms are expected during your session(s) and make sure your members know what to do if a 'real' fire alarm goes off
5. Establish where the venue's first aid equipment is located and who is the venue's nominated first aider.
6. If problems occur within the venue, the group leader should contact, in the first instance, the venue's manager/ representative to resolve the issue. If this approach is unsuccessful, then advise Bolton u3a's venue co-ordinator by email at venuescoordinator@boltonu3a.org.uk.

Safeguarding Policy

A feature of modern life is the need to be aware of safeguarding issues which may arise and affect members' welfare. U3a has a general duty of care to its members but does not have any statutory authority in this regard.

If you notice that a member is showing signs of distress or voices concerns about personal abuse they have experienced, especially between other members, then a tactful discussion, in a private space, is required.

Bolton u3a has compiled a policy guide on this subject with an associated report form to be completed in the event of issues being raised by members or observed by Group Leaders.

The report form is at Annex D and following completion, the issue should be reported promptly to the Groups Coordinator or the Chair of the Bolton u3a, for support and agreed further action.

Help for Running Your Group

Bolton u3a is a member of the Northwest Region of u3a's, who organise workshops and study days in the area, and details of such events are always advertised in the u3a Matters magazine.