

Background to u3a Movement and Key Principles

Origin: The u3a movement originated in France. It was established in 1973 by the Faculty of Social Sciences at Toulouse as an external adjunct to the university sector.

Expansion: In 1990, the concept was extended to provide access to education for the third age across all French universities. The movement subsequently developed across Europe and is now established internationally.

UK Model: The UK introduced u3a in 1980 but modified the concept significantly. It took the view that most retired people had knowledge and skills that could be shared with others for their education and pleasure. Most English-speaking countries follow a similar model. By 2020, the UK movement had grown to 1,000 branches with 450,000 members.

Bolton u3a: Formed in 1991, it started with a handful of members and 2 interest groups. Membership has grown to over 360 members running over 37 interest groups. Like all local u3as, Bolton is a member organisation of the Third Age Trust (TAT), the national support and advisory body.

Operational Independence: All u3as in the UK are "operationally independent" self-help organisations run by the voluntary efforts of their members. Interest Groups are run by members, with assistance available from the TAT and/or local members. Members who create and run these groups are given every encouragement and assistance.

Group Membership & Attendance Rules

Membership Requirement: Group Leaders and regular attendees of the groups should be current u3a members.

Taster Sessions: Attendees who are not current members are allowed either:
1 "taster" session at a maximum of 2 groups, OR
A maximum of 2 "taster" sessions at 1 group.

Fees: Taster attendees must pay the usual attendance fee. To continue attending after these sessions, they must pay their annual membership (or a pro rata rate as detailed elsewhere).

Starting a New Interest Group

Initial Steps & Approvals

Contact: Before starting a new group, a potential leader should contact the local Group Leaders Co-ordinator (GLC). They must explain the subject/theme of the group and what will be required regarding venue and equipment.

Committee Approval: Once the initial proposal is discussed with the GLC, it goes before the committee for approval. Any future changes must also be approved by the committee in advance.

Expertise: You do not have to be an expert in the subject to start a group. Other interested members can join to explore a particular subject together.

Viability: To be viable, a group should try to maintain an average attendance of at least 6 members.

Scheduling & Frequency

Logistics: The frequency of meetings (usually once or twice per month, depending on the topic) must be discussed with the GLC, along with the anticipated start date and duration.

Duration: Courses can be "open-ended" or for a specific period (e.g., 6–10 weekly or monthly sessions).

Pop-up Groups: If a group is only intended to run for a short period (e.g., 6 sessions) on a "pop-up" basis, it is feasible to meet weekly.

Holiday Breaks: Group sessions commonly break for holidays in July and August, as well as in December for Christmas, though this depends entirely on the individual leader and group members.

Publicity and Communication

Promotion: Once agreed, the date and time of the new group will be advertised in the monthly Newsletter until the group ceases to operate. This allows interested

members to contact the leader directly. Announcements are also made at the general monthly meeting and detailed on the website.

Leader Responsibilities: It is the Group Leader's responsibility to send details of the first meeting, and any changes to its format, to the Newsletter Editor.

Deadlines: Submission entries must be sent to the Editor no later than the **3rd Wednesday of the month.**

Automation: Unless details change, the Editor will automatically include the group entry in future Newsletters without needing further contact. Leaders can also supply the Newsletter Editor with a full schedule of meetings/topics to avoid making a monthly report.

Use Beacon to keep tabs on your group

Beacon is the u3a secure online database.

It is important to use Beacon so that you know you are complying with data protection.

You will also find it very simple to contact all your group members via Beacon.

Training in using Beacon will be offered. You are welcome to ask Beacon Admin Maggy for help (u3abolton@gmail.com)

Beacon also allows you to add as many 'helpers' as you want, which means you can delegate tasks like emailing members or printing attendance sheets.

Operating Principles to Consider

Venues

Town centre venues have become ever more expensive and can be difficult to come by as users from other organisations have increased.

Every time we use a new venue, we add them to our list. Beacon will automatically show you this list of options when you go to your own group page.

If you find a new venue, please let the venues coordinator know via venuescoordinator@boltonu3a.org.uk

Astley Bridge Baptist Church	Moss Bank Park
Bank Top URC	Olympus Fish and Chip Restaurant
Bolton Parish Church	St John's Methodist church hall Horwich
Bolton Quaker Meeting House	St. Andrew and St. George Church
Bradshaw Bowling Club	The Coffee Shop Heaton
Central Library Bolton	The Hive, Market Place
Claremont Church, St Georges Road	The Hub
Create	The Light Cinema, Market Place
Farnworth Baptist Church	The Little Theatre
Globe Cafe	Egerton Triangle Church annexe
Harwood Library	Walmsley Parish Church Hall
Harwood Methodist Church Cafe	Waterstones cafe
Harwood Methodist Church old church building	Westhoughton Hub
Moss Bank Park	Zoom

Insurance cover

An 'All Risks' policy, taken out through the TAT, is in place covering all U3A equipment wherever it is in use in the UK. There is also Public Liability insurance in place up to a limit of £10,000,000 on any one third party claim which indemnifies all Group Leaders, individual members, as well as the parent u3a.

In the event of a claim for injury and/or loss/damage to property occurring during an activity organised by Bolton u3a, wherever that activity occurs in the UK, the incident needs to be recorded (see additional files 05,06,07) and the completed report should be submitted to the Committee, via the Group Coordinator, for it to be dealt with appropriately.

Copyright

The venues we use have Public Performance Licences to allow for playing of recordings. A certain amount of Copyright cover is provided for photocopying of documents, but we discourage this as a normal practice especially if it involves photocopying a large part of a published book.

U3A Matters Magazine

All members may opt to subscribe to get the 6 copies a year of the national magazine, U3A Matters.

The magazine is also available free of charge online via

<https://www.u3a.org.uk/what-we-do/u3a-matters/screen-reader-editions>

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.

Specimen Attendance Register

GROUP NAME					
Member	U3a number	1st session	2nd session	3rd session	4th session

Venue Checklist (Day of Use)

Address of Venue -	
Name of Interest Group -	
Procedure	y / n
1 Emergency Exits unobstructed	
3 Fire Extinguishers in place	
4 Toilet facilities open, clean, paper available etc	
5 Walkways free from trip hazards	
6 Kitchen facilities accessible & clean	
7 Kettle leads in good condition, free from wear and fraying, plug securely attached/PAT test sticker in place?	
8 Refreshment items available	

Notes

Signed

Dated

Incident Report Form (involving injury/damage)

Notifier name	
Group name	
Contact details Phone Email	
Location of accident	
Date and time	
Summary of what happened.	
Injured person's name and address	
U3A membership no	
Age of injured persons	
Severity of injury, if any	
First aid or remedial action given.	
Action taken by group leader.	
Member's nominated emergency contact informed.	

Incident Report form (not involving injury/damage)

Notifier Name	
Group Name	
Date and time	
Location of incident	
Date and time	
Circumstances of incident	
Name and address of persons involved. Member's no if appropriate	
Details of any witnesses who could add information about the event	
Immediate action taken following incident.	
Details of member's emergency contact who was informed.	
Any other observations	

Safeguarding Report Form

Date incident reported or observed	Member involved	Nature of issue
Dates when issues occurred	Members involved	Location
Empowerment What action does member wish to take What support do they need?	Themselves	By u3a
Prevention what action can be taken to avoid repetition of, or escalation of, the issue problem	By the member	By u3a
Proportionality what response can be offered proportionate to the magnitude of the issue	By member	By u3a
Protection how can the member be helped or protected from future abuse	Member action	u3a action
Partnership What relevant statutory body needs to be informed		
Accountability Timely and accurate report passed to trust and regulatory authority	By member	By u3a

Important Update: Protecting Our Member Data

Thank you to Group Leaders who are doing a great job building and maintaining Bolton u3a. To support you in this, we must ensure we are all meeting our moral and legal obligations regarding the personal information our members entrust to us.

Please review the following requirements to ensure we remain compliant and secure:

- **GDPR Compliance:** Under Data Protection laws (GDPR), we are legally required to ensure that member information is kept secure, used only for intended purposes, and never stored on private, unprotected devices.
- **Safeguarding Information:** Member details (phone numbers, addresses, etc.) must remain strictly confidential. This information should never be printed and left unattended or shared with third parties outside of official group business.
- **Individual Accountability:** Your login credentials are for your use only. Sharing passwords—even with trusted friends or assistants—creates a significant security risk and is strictly prohibited.
- **We understand that not everyone is comfortable navigating the database, Beacon.** If you prefer not to access the system directly, you may appoint a Beacon Group Rep. This is a designated, tech-savvy member who can manage the data on your behalf, ensuring records remain accurate and secure. Beacon Group Reps would be given a login in their own name.
- **Mandatory Password Reset:** To ensure a fresh start for our security protocols, all Group Leader passwords will be reset on March 1st. You will receive instructions on how to set your new, secure password on that date.

Thank you