

U3A Oliva Group Leader Responsibilities – 2022/3

Thank you for being a Group Leader – the most important element of the U3A. Without you we would not have the opportunity to enable life-long learning for our members.

A Group Leader is not necessarily the teacher of the group, but the person who takes responsibility for the group.

We understand that being a Group Leader will take up some of your time (some groups more than others), but we fully appreciate that you as volunteers have your own life to enjoy. We will support and help you as much as possible to allow your group to run smoothly and effectively.

Group Leader Duties and Responsibilities

Group sessions:

- To liaise with / inform the Group Coordinator (groups@u3aoliva.org) about time / day / venue / costs etc for your group's sessions and activities.
- To co-ordinate the activities of your group so your members know of any amendments or cancellations. Some groups may benefit from a Whatsapp or messenger group.

Group management:

- To appoint a Deputy Group Leader who will take on these duties and responsibilities if the Group Leader is unavailable – and also to encourage members to self-manage if needed.

Group publicity:

- To ensure that your group's information on the U3A website is updated regularly, at least annually. The easiest way to do this is to send details to the Group Coordinator or Webmaster (webmaster@u3aoliva.org).
- Where possible send any special interest news, with photos if possible, to groups@u3aoliva.org to be included in newsletters, the website, Facebook or to aid in publicity of the group and the Oliva U3A.

Group membership:

- To maintain an attendance register and complete it at the start of every session. (Forms for this are available on the website for you to download and print). If you prefer please use an e copy.
- Non members of the u3a are not allowed to attend.
- To ensure all attendees in your group are paid-up members of the U3A – please check their membership card or check with the Group Coordinator.

- The attendance register is to be made available should the Secretary or Group Coordinator require it.

Duty of care for Group members:

- To ensure that group members (and non-members on trial) are aware that all activities are undertaken at their own risk. If participants injure themselves or another member, they must have their own insurance to cover all relevant costs. **Oliva U3A holds insurance which is third party only. Oliva U3A cannot and will not be held responsible for such accidents and injuries.**
- To ensure that any accidents and injuries are reported to the Secretary (secretary@u3aoliva.org) without delay.

Group Expenses and Accounts:

- To liaise with members to keep the group self-financing if needed (e.g. photocopies, supplies, room costs etc).
- To keep clear and accurate expense accounts if the group attracts any income and expenditure (see notes below).
- To submit expense accounts for the previous year to the Treasurer (treasurer@u3aoliva.org) at the beginning of each new year.

Notes on Group Expense Accounts: Income and Expenditure

Most groups are self-funding and do not occur any income or expenses. However, there are a few exceptions. **No group leader should be out of pocket for any expenses they have incurred.**

Equipment and Instructors

- When setting up a group, you may need some equipment or particular tools. These can be purchased by the Group Leader up to the value of 50 euros, upon agreement with the Group Coordinator. A receipt must be retained and sent to the treasurer along with your IBAN number for refund. Anything over 50 euros needs authorisation from the Committee. All items will remain the property of the U3A and listed in the assets.
- **A Group Leader (or Group member) may not act as paid Instructor** as this contravenes the ethos of the U3A of sharing knowledge. Sometimes paid Instructors are required for a particular group i.e. Zumba and Yoga. This cost needs to be shared among the attending members. **A maximum limit is that agreed by the Group Leader.**

- Instructors may be hired and paid **if no member of the group** is competent to lead the activity.
- If an instructor is hired, their fee should be agreed for a block number of sessions, which could be for 4 weeks, one month or whatever the group chooses, and the group's members should divide the total cost by the number attending and pay in advance for that block.
- **No refunds will be made for non-attendance.**
- New members joining the group part-way through a block of sessions will pay pro-rata for attending.
- **If regular fees are collected from members and an excess accrues, this can either be refunded to the members, used for a 'free' session, or spent on refreshments for the group.**
- Any additional instructor costs not met from the regular fees (exceptional circumstances only) should be approved in advance by the committee and if approved will be paid from the U3A general fund.
- **Payment receipts from an instructor, for paid fees, (by the members) must include name, address and NIE / NIF number of the instructor and be provided to the Treasurer at the end of the U3A Year.**

Other Expenses

- Meetings are sometimes held in members' homes, and it is reasonable to charge for tea / coffee and biscuits and when provided members are asked to contribute 50c per person. If more elaborate refreshments are provided, then the group leader should make an estimate of the cost and divide it among those present.
- Premises are normally available free of charge, but in the rare case where payment (by the member) is required for premises, the same record keeping requirement will apply (a receipt must be obtained from the owner of the premises and treated in the same way as that for instructors, see above).
- Photocopying expenses are not reimbursed through the expenses system. We understand that some Group Leaders use handouts in their groups for the benefit of the members. As such the members should only be too happy to cover the cost, therefore we suggest documents should either:
 - Be emailed by the Group Leader to each group member for printing prior to the next meeting or
 - Be printed by the Group Leader and paid for by the members through a small donation of money either collected on demand or monthly / yearly.
- Shared resources such as the projector, PA system, DVD player etc are normally kept at the CPC and are available for the use of any group. If you wish to use any of these, please contact the Vice-President (vice-president@u3aoliva.org).
- Groups are encouraged to organise excursions to places of interest relevant to their group activities. If desired, these excursions can be thrown open to the

wider membership, and the Travel Team (travel@u3aoliva.org) can assist with organisation and publicity. All excursions costs should be shared among the included members.

Please Note :

There should never be a SURPLUS OF FUNDS within a group at the end of the financial year. If there is a surplus, this should only be of an amount equivalent to that required to pay your Groups instructor at the first group meeting of the New U3A Year. All additional surplus funds are to be passed to the Treasurer for inclusion in the general fund account.

About this document

- This document will be updated at the start of each new U3A year, and will be issued to all Group Leaders.
- If any Group Leader has suggestions for any improvements / modifications to this document, these should be brought to the Group Coordinator's / Committee's notice for inclusion (if approved).
- **Unless a Group Leader contacts the Group Coordinator to the contrary, it will be assumed by the U3A that within two weeks of this document being issued to Group Leaders at the beginning of each new U3A year, it will have been read and understood by all recipients and will be adhered to.**

We hope this document will be of use in running your group and will help to maintain consistency within our U3A. If you require any clarification of the above, please contact the Group Coordinator on groups@u3aoliva.org.

Updated 10th September 2022