



Group Leaders' Handbook

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Contents

1. Introduction	3
2. Responsibilities of a group leader	3
3. Setting up a new group	4
4. Ground rules for interest groups	4
4a. Group expenses	5
4b. Events, outings and site visits	5
5. Formalities and Legalities	5
5a. Health and Safety	5
5b. Accidents and emergencies	5
5c. Access and inclusivity	6
5d. Insurance	6
5e. Licences	6
6. Ideas for keeping groups lively	6
7. General information about Perth u3a	7
8. The u3a movement	7

The Third Age Trust (the UK national body which provides support to all u3as) has many useful supplementary reference documents available online through www.u3a.org.uk . To access these documents, however, you will need to set up a personal account – a very simple process - via their home page.

1. Introduction

Without group leaders Perth u3a could not function. This handbook aims to provide all the information you need, and some ideas that can help to run a successful group. Comments on how to improve the content are welcome and should be directed to the Groups Coordinator.

2. Responsibilities of a Group Leader

The group leader's role is essentially to keep the group functioning; it should not be an onerous task to do so and co-leaders can be nominated if it is. The main responsibilities of a group leader are to:

- Decide on the maximum group membership taking into account the nature of the group and the meeting place.
- Decide with the group how it will operate, what it will do and who will be involved in delivering the content. The group leader is not expected to do everything – their role is to facilitate and administer the group.
- Periodically (notionally every 6 months) refresh the group's activities published on the website; simply send the changes to the relevant Perth u3a web page category editor who will update the website.
- Agree with the programme editor the group details as they will appear in the programme for the next session. You will receive a message in the early summer about the forthcoming programme.
- Contact current group members before Registration Day to see if they wish to continue in the coming session.
- Attend Registration Day (or ask someone from the group to attend) to speak to members interested in joining the group and to compile a register of new group members and/or a waiting list. See also Section 4 (Ground rules etc) below for the Committee's policy on members joining groups.
- If a waiting list develops liaise with the Groups Coordinator about possibilities for starting a second group. The Groups Coordinator needs to know the size of waiting lists and this is best done by keeping the group details updated on Beacon (the u3a membership database).
- Update the list of group members on Beacon after registration. Group leaders are strongly encouraged to register with the Beacon Administrator to access Beacon so that they can enter the names themselves and keep the database accurate thereafter.
- Keep group members up to date about the group's activities. Email communication with group members is available through Beacon.
- Request to borrow any equipment, such as laptop, if needed from the Equipment Coordinator via the website (click on **Groups → Information for Group Leaders**).
- For groups meeting in public premises, liaise with the venue, familiarise yourself with the health and safety arrangements there and make these known to members.
- For meetings not held in Unit 7 or Unit 6 inform the venue as soon as possible if a scheduled meeting is not taking place and let the Accommodation Coordinator know so that u3a will not be charged for the session.
- Notify the Committee Secretary via the **Contact** page of Perth u3a website with group information worthy of inclusion in the monthly publication of **News Roundup**.
- It is recommended that a register is kept of attendance at each group meeting.

- Attend the annual meeting (normally March) of group leaders.
- Seek a replacement leader, in consultation with the Groups Coordinator, when you wish to relinquish the role. Without a leader the group cannot exist.

3. Setting up a new group

Any member is welcome to suggest the creation of a new interest group. The Groups Coordinator's help is vital for guiding the group from concept to reality. If a new group is set up to accommodate members on a waiting list the existing group leader can be a big help but they are not expected to lead it. It may be that someone from their existing group would be willing to do so, in which case being prepared to 'buddy' a new leader is extremely useful in building up their confidence and passing on valuable experience.

The first formal step in setting up a new group is securing Committee support. A simple proforma (downloadable via **Groups → Information for Group Leaders → Documentation**) needs to be completed then submitted through the Groups Coordinator to the Committee for approval, after which support will be available to get things off the ground, and insurance cover commences.

Where possible new groups are encouraged to start as house groups. Perth u3a has leased accommodation available to groups primarily in Unit 7 but also in Unit 6 at the Perth Business Centre, Glasgow Road. Should this space be needed then the Groups Coordinator needs to be engaged for advice on current room availability.

4. Ground rules for interest groups

The following points are intended to make your task as easy as possible.

- All members of a group must be paid-up members of Perth u3a and the group leader must ensure that only paid-up members attend group meetings. The status of a member's subscription can be quickly confirmed through Beacon. However, as an inducement for prospective members to take up full u3a membership, group leaders may allow non-u3a members to attend a single group meeting on a one-off 'taster' basis.
- Members who sign up but then do not attend meetings can be problematic, particularly if there is a waiting list for the group, and the Committee has therefore agreed that members who fail to attend, or to send apologies on reasonable grounds, on 3 successive occasions will be deemed to have forfeited their membership of the group. You may inform them of this and invite a member on the waiting list to take their place.
- The general rule for walking groups is that dogs are not allowed due to the risk to livestock and difficulties with car sharing. The Committee has, however, agreed to the presence of dogs on a case-by-case basis provided they are kept on a lead and with the group leader's agreement.
- You are not expected to handle money other than minor amounts for refreshments or for special events. The cost of hired accommodation for groups meeting monthly is met by Perth u3a so group members are not expected to make a contribution over and above their membership subscription. Exceptionally, groups that choose to meet more frequently will normally be expected to contribute to the extra venue cost. Any other activity involving cash should be discussed with the Treasurer in advance.

- Most groups meet once every 4 weeks with some meeting fortnightly or weekly. The frequency of group meetings must be discussed with the Groups Coordinator when the group is set up and any changes must be agreed by the Committee in advance.
- Starting with the 2026/27 session an embargo on existing members joining groups will be in effect from 4 July (for accounting/admin reasons) until Registration Day. New members are not subject to the embargo.

4a. Group expenses

Group leaders and members of groups may occasionally incur expenses, such as the purchase of materials or equipment, necessary for the functioning of the group. The Committee has decided that to budget for a fund for each group would unreasonably increase the annual subscription charge, so as a general principle the costs of such items must be borne by the members. Group leaders must request prior authorisation from the Committee through the Treasurer for reimbursement of exceptional expenses. Under no circumstances may a claim be made for payment of a fee, donation, or travel expenses for a visiting speaker.

4b. Events, outings and site visits

External visits are at the expense of members over and above the annual membership fee. Payment for such visits should be made on invoice by the Treasurer and processed through the u3a bank account. The organiser of such events is responsible for collecting payments from members, which are then paid into the Perth u3a account. You should make clear to members booking places on an outing that the cost is payable on booking and that no refund can be promised on cancellation of a place unless the member finds a replacement. Advance notice should always be given to the Treasurer. In some cases it will be appropriate for members to pay their individual entrance fees to the visited venue. Guidance should be sought when this may apply prior to making any arrangements.

5. Formalities and Legalities

5a. Health and Safety

It is important that Perth u3a operates in a safe manner. The Health and Safety Coordinator is the Committee member responsible for Health and Safety matters and can be contacted via the website. A Perth u3a Health and Safety Handbook is available on the website (see **Documentation**); it includes specific guidance for walking groups and general guidance on dealing with accidents and emergencies. In addition to the need for all group members to be familiar with the emergency procedures in force on paid premises, group leaders should know the contact person for the venue and be aware of the location of first aid equipment.

5b. Accidents and emergencies

- In the event of having to contact the emergency services you should know the postcode of the premises you are using.
- All accidents and emergency incidents must be reported to the Committee using the incident report form available on the website (see **Documentation**).
- It is sometimes necessary to contact a friend or family member if a group member is taken ill. It is a delicate matter to broach this in advance but it might be worth speaking with the group at the beginning of the session about this eventuality. Some people will keep an ICE (In Case of Emergency) number on their mobile phone. For groups undertaking potentially risky activities such as hill walking it is good practice to compile an emergency contact list and to hold a record of mobile phone numbers for participants.

- Do not rely on the expertise or past professional knowledge of group members – it may be some time since they last practised and their professional registration may have lapsed. If in doubt call the emergency services.

5c. Access and inclusivity

Every effort is made to use accessible venues and the Third Age Trust has issued guidance on accessibility for disabled members. Group leaders should be sensitive to members with any sensory impairment which makes it harder for them to see or hear the proceedings. There are often simple steps which can alleviate such difficulties - such as ensuring that contributors always speak loudly and clearly, or using PA equipment. Again, the Third Age Trust has provided guidance on support for members with sensory impairment.

5d. Insurance

Third Age Trust provides several different forms of insurance for local u3as and their website has a variety of relevant information. For insurance purposes all those taking part in u3a activities must be paid-up members and a register kept at each meeting.

5e. Licences

There are copyright issues in respect of music, film and publications so you should take care when photocopying materials, playing music or showing films. Third Age Trust provides licences for local u3as; details of what they cover are available from the Secretary. Further information about copyright issues can be found on the Third Age Trust website.

6. Ideas for keeping groups lively

You may sometimes feel that your group is stuck in a rut, has lost its way or needs a new injection of ideas or enthusiasm. If this is the case it is not just a matter for you to address but one in which every member should be involved. Some possible responses are:

- Discuss with the group the possibility of another member taking over as group leader/facilitator, either temporarily or permanently.
- Consider revising the group's remit to take it into new areas of learning.
- Try introducing input from new sources. Some groups have successfully used Open University course material and there is a wealth of free online study material available through Massive Open Online Courses (MOOCs). The Third Age Trust also offers advice on using MOOCs.
- Contact the appropriate national subject adviser - there are details in every issue of *Third Age Matters*. Some subjects have newsletters or start-up booklets. Through a subject adviser find out which other u3as have a group on the same subject and see if they can provide new ideas.
- Consider adopting the 'Shared Learning Group' model and undertaking a special time-limited project.
- The Third Age Trust has some useful online information on keeping your group vibrant.

7. General information about Perth u3a

It is assumed that you know something about the organisation already but the following non-exhaustive list of items of general information may be useful:

- **Constitution.** This can be found on the Perth u3a website via **Documentation**.
- **Committee.** For details of current members and their roles see **About us → Committee**.
- **Data protection.** In accordance with the provisions of the Data Protection Act access to the membership database (Beacon) is restricted. Perth u3a's data protection policy is set out in **Documentation**.
- **Committee minutes.** The last 6 are available via **Committee → Committee minutes**.
- **Code of conduct for committee members.** This is set out in the Trustee Code of Conduct (see **Documentation**).
- **Membership.** Anyone not in full time employment is eligible to join u3a. The website has a membership form via **Welcome → join us**. Sessions run from late summer to the following May.
- **4 week cycle.** Groups have a slot in the programme on a 4 week cycle. This means that meetings do not always fall in the same week of the month but the programme sets out clearly how the cycle works with the dates for each group meeting. There is a break from mid-December until after New Year, and the last cycle falls before the AGM in early May. Some groups (particularly outdoor-orientated) continue to operate over the summer.
- **Communication.** Perth u3a publishes a **News Roundup** every 4 weeks throughout the session. This is an important means of sharing information and copies are available from the **News** page of the website.

8. The u3a movement

The University of the Third Age (u3a) movement allows retired and semi-retired people to come together and learn together, not for qualifications but for its own reward. Members share their skills and life experiences: the learners teach and the teachers learn, and there is no distinction between them. The u3a movement is supported by its national organisation, the Third Age Trust, which has a series of online articles about the underpinning principles of the u3a. Additionally,

- All u3a members are entitled to receive the magazine *Third Age Matters* as a part of their membership benefits.
- Subject advisers are a valuable resource for group leaders.
- Summer Schools and other events are available to members.
- The Third Age Trust office in Bromley, Kent holds a stock of materials available on loan in its Resource Centre.

There are some 50 local groups in Scotland with Perth u3a being one of the longest running and largest. Scotland has a representative trustee at the Third Age Trust. Occasional meetings of representatives of all Scottish u3as are held and conferences and events are organised. For more information visit <http://u3asites.org.uk/code/u3asite.php?site=808>