SPELTHORNE U3A K2

GROUP LEADERS' INFORMATION BOOKLET

July 2026

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1. Introduction

Interest groups are the life of SU3A K2. There are as many ways of approaching the establishment and running of groups as there are people to run them. This pack summarises the experiences and practice of many group leaders in K2 and from many other U3As and is passed on in the hope that it may be useful.

The following terms are used in the booklet:

Groups Co-ordinator – the committee member responsible for facilitating the initiation of new interest groups and supporting all interest groups.

Group Leaders – the members who are the link with the Groups Co-ordinator and will take a leading role in co-ordinating the interest group.

Group Contact – the member of an interest group who has volunteered to pass relevant information on to group members for those groups who do not have a specific leader e.g. MOTO (Members On Their Own). Known as “Point of Contact”.

Trustee – a member of the K2 Committee.

2. Starting an Interest Group

Anyone wishing to start an interest group should notify the Groups Co-ordinator.

- An announcement will be made at the Citadel monthly general meeting asking those interested in joining such a group to give their names to the Groups Co-ordinator, usually by e-mail and agree to meet together at a certain place and time.
- Members at that meeting will then discuss informally the framework of the group.
- At this first informal meeting, group members should be asked to share responsibilities of running the group rather than asking one person to take on everything.
- The notion that an “expert” will deliver a “course” should be discouraged. K2 is a co-operative and mutually supportive organisation, not a service provider. Naturally, an “expert” is a huge asset but the ethos of co-operation should be foremost.

3. The First Meeting

At the first meeting, the group members might find the following topics useful to progress things.

3.1. Setting Goals

You might like to consider the following:

- What would you like to do?
  - Include the range, content and nature of the subject to be studied, the timescale etc.
- How can we achieve this?
  - What common knowledge do we have already? What resources can people contribute? How will we organise the group? Who will do what?
- What study/learning methods can we use?
  - Books, DVDs, PowerPoint presentations, online material, online courses, etc. Volunteer experts who can be invited to demonstrate skills or give occasional talks. Demonstrations. Trips/events etc.
  - REMEMBER people may not concentrate fully on a topic for more than about 30 minutes if the same method of delivery is used e.g. an unsupported talk or lecture. It helps to build in changes in delivery and learning/study techniques.

  - Where and how often shall we meet?
  - Try to consider where people live. If they are travelling from a wide area, the location could be moved on a rota basis or it might be more convenient to meet at a central point. The important thing is to agree about the location. For groups needing a larger venue, a list of local ones can be found on the K2 website – click here.

3.2. Communication

- Ask group members to provide contact details i.e. telephone number(s)/e-mail address and to carry their ICE card with them at group meetings and especially on trips or outings.
- Your members' details need to be handled carefully. It is recommended that you consider using the K2 Beacon administration system – details are available from the K2 Beacon Administrator. If you prefer not to use Beacon, it important that you read the information in Annex 1.
- If you use e-mail to contact your group members, messages should be sent on a "BCC" basis unless all members have agreed otherwise.

3.3. Once all of these and any other matters have been discussed, inform the Groups Co-ordinator so all members know of the group's existence and the Groups Co-ordinator can help with advice and practical arrangements.

3.4. Once a group is set up with the prior agreement of the Committee, you are fully protected by the liability insurance policy provided by the Third Age Trust.

4. Types of Study

There are various types of study, aim for a good mixture of them.

- **Teamwork**. Group members share the delivery and facilitate the study
- **Leader led.** The leader facilitates the planning of the learning activities. Once the programme has been determined, individual members take responsibility for the various elements of the programme/administration. The leader continues to lead sessions.
- **Teacher led.** Here the member with the necessary expertise leads sessions. Other members take on necessary administration.
- **Resource Centre led.** Enthusiastic members, keen to pursue an interest but without expertise among them, join together and contact the Resource Centre to supply them with the non-book materials they need.

5. The Group Leader's Role

- Organise regular planning meetings (see below) to decide on the programme and share out the preparation tasks. As many group members as possible should participate in preparation for the sessions and in the sessions themselves.
- Guide the group through a course of study.
- Control the sessions in respect of both timing and content. Timing is especially important if members have been asked to contribute prepared pieces. If time runs out it can be disappointing if members have wasted preparation time.

6. Planning

Regular planning sessions can contribute towards establishing a lively, dynamic interest group.

- The best ideas can come from an open session where everything relevant to the topic can be suggested.
- Encourage constructive comments and try not to use negative comments until a good selection of possibilities have been identified.
    - When planning future programmes consider:
    - Should the group continue as before?
    - If not, how should things change?
    - Has the time come to split into sub-groups?
    - Is a breathing space needed before starting again?
- Useful contact details – see K2 and u3a websites:
    - Click here for K2 website.
    - Click here for u3a website.

7. Financial Arrangements for Groups

7.1. General Guidelines

- Each interest group must be self sufficient i.e. it must cover its costs between its members.
- Group self-sufficiency does not imply that funds belong to a group; all funds belong to K2.
- An agreement for the hire of a hall must be signed by a Trustee.
- Payments should be made from the interest group's funds. A personal credit card may be used to make payments if this is the only practical way.
- If collecting cash for hall hire, remember to set the attendance charge at an appropriate level to allow for variations in attendance levels. In some circumstances, it may be advantageous to collect money for several meetings in advance.
- The K2 Committee can make a small amount of money available to new groups if they have start-up costs e.g. money for equipment, initial payments for hall costs. (Click here for the PDF or here for the Word version of the form).
- Never open a bank account.
- Never apply for grants.
- Keep a record of money received and where possible avoid cash.
- Never ask members to pay money directly into your personal account.
- Members' money should not be paid into your personal account; however, if unavoidable, cash may be paid into your personal account provided the K2 Treasurer is notified (preferably by e-mail) of the amount and Group concerned. Also, provided that a cheque for the relevant sum is then transferred to the K2 Treasurer as soon as practically possible. The K2 Treasurer will accept cash to the value of £50. If the group leader needs advice regarding a larger amount of cash, please contact the K2 Treasurer to discuss options.
- Cheques must be made payable to "SU3A K2" and forwarded to the K2 Treasurer for banking.
- Any money received and recorded can be banked by the Treasurer on request by the group leader. (Click here for the PDF, here for the Word or here for the Excel version of the form).
- Get receipts for payments whenever possible. Any payment(s) made by a group leader will be reimbursed by the K2 Treasurer on production of the relevant receipt(s).
- Report to the K2 Treasurer as regularly as possible.
- If a group closes, any residual funds must be returned to K2 together with a record of money received and spent.

7.2. Interest Groups where no rental or similar costs are involved

For interest groups meeting in private houses, it is recommended that members agree a small contribution for refreshments.

7.3. Expensive events

The cost of participating in expensive events e.g. theatre trips including coach hire where appropriate must be shared equally by all attendees. It is strongly recommended that a budgeting approach is taken and if necessary, a refund can be given on the day.

7.4. Payments to other charities

- K2 and its groups cannot raise money for another charity; however, it is permissible for a group to hire a hall or speaker from a charity.
- If a speaker requests a one-off donation to another charity in lieu of a fee, it is strongly recommended that a speaker is paid direct and he/she makes the donation to his/her chosen charity.
- A collecting box for another charity may be displayed at an event/meeting so long as it is made clear that a donation is not required for attendance.

8. Groups Held In Outside Accommodation

- When selecting a venue, consult the risk assessment checklist (click here) and the advice sheet on accessibility for disabled members.
- Also, when selecting a venue, take into account any audio-visual equipment that your group may need. It is strongly recommended that you consult the Groups Co-ordinator to see what equipment is available from K2 before booking a venue.
- Ask a Trustee to enter into the rental agreement.
- On arrival, use the venue/day of use checklist (click here) to ensure that everything is in place and as it should be. If you have any safety concerns, do not continue if they cannot be resolved to your satisfaction.
- Make sure you know the postcode of the venue and fire assembly point.
- If your activity takes place in a workshop/outbuilding, consult the risk assessment checklist workshop activity (click here).

9. Group Organisation

- Ensure that all members of the group are members of SU3A K2 and check when anyone new arrives.
- A register should be kept at each meeting as a record of attendance. It could be useful if an incident/accident occurs at the address.
- As a general rule, a non-K2 member can attend one interest group meeting to assess whether it is suitable for their level of ability. This must be agreed by the group leader. If the interest group meets in a K2 member's house then, where appropriate, that K2 member must also agree to the non-K2 member's participation.
- If you accept a non-K2 member into the group for one meeting, you must advise the Groups Co-ordinator prior to the meeting, so that the non-K2 member will be covered by the K2 insurance.
- In the event of a non-K2 member asking to attend another interest group meeting, they must be advised that membership of K2 is necessary for them to do so.
- If a member needs a carer at meetings, the Membership Secretary should be contacted beforehand to make sure that the carer has completed the "Carers Registration Form" (click here or contact the Membership Secretary).
- If a member needs a carer at meetings, then so long as the carer is unpaid e.g. a family member, the carer does not need to be a member of K2 and will be covered by

the K2 insurance. If the carer is paid, then they will not be covered by the K2 insurance. In the latter case, it is recommended that you advise both parties of this.

- If a member stops attending, try to find out why.
- Make sure you give sufficient information for group members to make an informed choice as to whether they wish to participate and then make their decision. This is particularly important if you are running a physical activity. You must not make the decision for them or exclude them from a particular activity.
- If your group involves physical activity, remind the members that they undertake it at their own risk.
- If you are leading walks, consult the walk leader checklist – click here for the PDF or here for the Word version.
- For practical reasons, it may be necessary for a group leader to limit the number of members and if appropriate, create a waiting list. In this situation, the group leader may remove a member from the group for regular non-attendance. This must be made clear when K2 members join the group.
- If you require advice on legal matters or need help with a problem, you may find help on the u3a website – click here.
- There is subject support on the u3a website – click here.

10. Miscellaneous

- In the case of an accident which results in injury or damage to property, complete an accident form - click here for the PDF or here for the Word version.
- If emergency first aid is required, dial 999.
- Personal accident insurance cover is not provided by The Third Age Trust.
- If damage is caused to property by a member of the group, take full details, in case it becomes the subject of an insurance claim.
- Should you have a difficult member whose behaviour is regularly disturbing other members of the group, contact the Groups Co-ordinator for advice and assistance. Do not take action yourself.
- If you have a serious problem in a session, it is acceptable to ask a member to leave but advise the Groups Co-ordinator as soon as possible after the end of the session.
- If you have a member who is not able to cope independently, inform the “Wellbeing and Welfare Officer” – details are on the K2 website (click here) and in K2 News.

11. Information Available On The Website

Click here to access group leader documentation including:

- Beacon Supplementary Guide.
- Dementia guidance from The Third Age Trust.
- Carers Registration Form.
- Group Leaders’ Information Booklet.
- Running a group discussion.
- Cheque and cash banking forms (Word version and Excel version).
- Expenses claim form (Word version).
- Monthly group activities calendar.
- SU3A K2 equipment list (password required).
- List of our venues.
- Walk Leaders’ risk assessment (Word version).
- Venue risk assessment checklist (Word version).
- Venue checklist – day of use.
- Workshop activity risk assessment checklist.
- Incident report form (Word version).

ANNEX 1

DATA PROTECTION GUIDELINES

The General Data Protection Regulation (GDPR) means that the K2 Committee should offer you some guidelines about the way in which you handle the members' personal details. In the list below, there are a number of points that you may want to consider in administering your Group.

You will almost certainly have been following the principles behind the guidance but probably without realising it, so it is very unlikely that they will make any significant difference to the way in which your Group is run. The list is not meant to be all inclusive as all Groups are different, consequently not all of them will be applicable to how your Group is administered.

- If the membership list is computerised, use password protection on the file. With Microsoft Excel and Word, you can protect your file as follows:- Click **File > Info > Protect Workbook/Document > Encrypt with Password** then enter the password e.g. "Spelthorne@TW153JY". Passwords should be a combination of upper and lower case, letters and other characters.
- Also, it might be worth considering advising/reminding your members that their details are held on a computer.
- Limit the number of people who have access to the complete list of personal details; unless the way in which your Group works is based on members sharing their details.
- If you e-mail your members, send the message on a "bcc" basis; however, if e-mail addresses are shared e.g. for car sharing, it is suggested that new members are made aware of this when they join your Group.
- If you print out meeting attendance sheets, consider not including all personal details.
- If you organise a visit that requires members' details to be passed to a third party, advise members of this on the application form.
- If someone leaves your Group, you should delete/destroy any records of their personal details i.e. e-mail address, postal address etc.
- If you think there may have been a "data breach" e.g. your computer has been hacked or stolen, please advise the members of your Group so that they have the option to take action to protect themselves. Please also advise the K2 Chairman (click here) and Data Protection Officer (click here).
- If you have any questions, please contact the K2 Data Protection Officer - details are on the K2 website (click here) and in K2 News.