



## Locks Heath u3a – Interest Group Guidance

### Forming a new group – first steps

- Discuss your idea for a group with the Committee Groups Liaison.
- Consider if other members would be interested in joining a group by, for example, speaking to other members at a monthly meeting or asking for feedback in our newsletter.
- Consider what the aims of the group would be – what are you hoping to learn / achieve / share?
- If relevant consider the level that the group will be aimed at – beginners, improvers, advanced.
- Look to see if there are subject advisors for your idea listed on the national u3a website - they can support with ideas for the development of the group.
- Generate interest by promoting your group using as many different methods as possible. This could include our newsletter, announcing at a monthly meeting, talking to members in groups that you attend and a notice on the group's board.
- Consider where you might meet – home(s) or public venue? In most cases a group will begin by meeting in a member's home. If the group outgrows a home-based meeting, then with advice from the Groups Liaison and Treasurer a hired venue can be sought.
- Consider whether there are any risks that might occur as a result of the group's activities and / or meeting place. The Groups Liaison will advise you on risk assessment procedures.
- Agree when the group will run. Most groups meet monthly, but some are more often.
- Identify what you want to achieve from your first meeting.
- Organise an initial meeting and invite those who have expressed an interest to attend.
- Liaise with the Groups Liaison / Beacon Administrator to set up your group page on Beacon. This is a web based u3a system facilitating easy and confidential communication with group members.

### The first group meeting

- Set up the meeting venue so that members can see and hear each other to their full potential. Remind members to raise their voices and speak clearly.
- Introduce yourself and the purpose of the group.
- Ask about the skills and experience within the group.
- Agree the tasks that need doing to run the group and who is willing to support these – for example, who is willing to help with developing the programme, managing Beacon, contributing to the newsletter, organising refreshments or keeping the register.
- Revisit, if relevant, the level that the group will be aimed at – beginners, improvers, advanced.
- Agree how the group will work – discussion, instruction, presentation, activities, visits etc
- Agree the costs for running the group and how much members will pay.
- Discuss how group members will communicate with each other bearing in mind data protection guidance (e.g. outside of Beacon to always use the BCC function on emails to avoid sharing e-mail addresses) and always seek permission and agreement.

- Agree some ground rules e.g.
  - Being punctual
  - Listening to each other
  - Allowing others to speak
  - Agree to disagree amicably and be respectful to other group members
  - Acknowledging that every contribution matters
  - Having patience with other group members and fostering a culture of mutual respect
  - Letting someone know if you are unable to attend.
- After your first meeting it is a good idea to feedback what was agreed to the Groups Liaison and to finalise arrangements.

### **Policies and procedures**

It is important to familiarise yourself with Locks Heath u3a's policies and procedures which can be found on the Documents page of our website.

It is particularly important to read these documents: Safeguarding, Equality Diversity & Inclusion, Evacuation, Risk Assessment, Copyright & Licencing.

### **Problem solving**

Sometimes issues can arise within a group that disrupt it's smooth running and can spoil the enjoyment for everyone. Don't leave a problem too long before trying to resolve it. Talk to the Groups Liaison if you are unsure how to resolve the problem or just want someone to explore options with.

### **Risk Assessments, Accidents and incidents**

- Groups have a responsibility to complete risk assessments and to put measures in place to mitigate any risks.
- There are five types of Risk Assessments: Venue, Home, Walks, Day Trips and Personal.
- Groups are reminded of the importance of reporting any accidents or other relevant incidents that occur during a group meeting or activity. You should speak to the Groups Liaison as soon as is practicably possible. If necessary, issues can then be addressed in a timely manner. Incident report forms are available on our Locks Heath u3a website.
- If an emergency incident happens during a group meeting or activity then someone should call the emergency services.
- You should note your group members' emergency contact details from Beacon and always have these to hand. Additionally, it is important for the venue address including the post code to be written down and easily available in case the emergency services need to be contacted.

### **Accessibility**

- Do not book a venue or meet in a home where members are unable to access or easily evacuate in the case of fire or another emergency.
- Ensure that account is taken of the hearing needs of members and where appropriate use amplification, such as a PA system, which are available within our u3a. Where required remind members to speak clearly and encourage members with a hearing loss to sit near the speaker.
- Ensure that account is taken of the visual needs of members and ask what assistance would be helpful, eg if using screens consider asking another member to assist with a discreet verbal explanation.
- Ensure that account is taken of the cognitive needs of members and ensure that content is as accessible as possible.
- Refer to our Equality, Diversity and Inclusion policy as a reference point.

## Website

- After consultation with you, a page for your group will be set up on the Locks Heath u3a website.
- Interested members will be able to contact you by clicking on your name (first name only) which will take them to an email form. Your email address will not be visible.
- Please let the web manager know when dates are arranged or changes are made to a group programme so that the diary can be kept up to date.
- Please send in photos of group activities to the web manager. When taking photos always check that members are happy with a photo being posted on our Locks Heath u3a website. Other than our website, photos of members should not be shared beyond the group and will never be shared to Social Media, such as Facebook.

## Beacon

Beacon is a u3a administrative software system used to manage membership details and access is given on a need-to-know basis.

Your group will be set up on Beacon and to access it you will need to do the following:

1. Go to [u3abeacon.org.uk](http://u3abeacon.org.uk)
2. Name of u3a - scroll down to Locks Heath. Click enter.
3. Enter your username – provided by our Beacon Administrator.
4. Enter your password – provided by our Beacon Administrator.
5. This will take you to Beacon and for subsequent visits your details should be saved. Adding Beacon to your bookmarks makes it even easier.
6. Click on Groups.
7. Select your group from the table and you will be taken to an information table about your group.
8. Click on Members where you will see yourself as Group Leader and other members listed.
9. You will see that it gives addresses, phone numbers & emergency contacts.
10. To add a member to your group, look under the table of members for 'Select member by name' select member, choose the new member from the drop-down menu and click add.

## Keeping Beacon up to date

It is important to keep your group list in Beacon up to date.

- If a group member doesn't attend a group for several months, then it is good practice to make contact with that member to check if they wish to continue to be part of the group.
- If a member passes away, lets their membership lapse, or resigns then our Beacon Administrator will amend the central record and this will then be indicated on the right-hand side of the table and the member's information can be deleted from your group by clicking 'remove.'
- If you are unable to use Beacon yourself, it is important that you let the Groups Liaison know of changes to your group membership and they will update Beacon for you and email you the new list.

## Sending an email to group members via Beacon

1. Open Beacon
2. Click on Groups.
3. Select your group from the table and you will be taken to an information table about your group.
4. Click on Members.
5. Click on Select in the top or bottom left-hand corner.
6. Click 'Select All.'

7. Click on 'Do with selected' (The box to the right should say 'Send E-mail.' If not then click on arrow to choose this).
8. An email pro-forma will open - add subject and message then scroll down to click send at the bottom of the form. To personalise emails, type 'Hi' or whatever you normally use, then click on #FORENAME in the box on the right-hand side and each recipient's name will be added when the email is sent. This is very useful as the group increases in size.

### Alternative ways of communicating with group members

- Whilst using Beacon is preferable, it might be that as a group you prefer to communicate with members using a different method.
- If this is the case then when using WhatsApp, personal e mail or phone it is important that group members are happy and fully in agreement with this arrangement

### Newsletter

- The editor of our newsletter sends a monthly invite to the Group Leaders asking them to contribute a small piece about what their group has been doing and activities going forward.
- It's always good to send in a few lines.
- The newsletter is circulated to members by e-mail.
- Members can also opt to have the newsletter mailed to them which involves a small annual charge to cover postage.
- An edited version of the newsletter called 'Monthly Update' is posted on our website. It is edited to remove surnames and personal contact details.

### Attendance Register

- For insurance and evacuation purposes please keep and retain a register of those members attending all meetings and outings.
- Register templates for using monthly or annually are available on our website under documents-templates.

### Finance

- **General:** An important part of the Treasurer's job is to support the Groups with running their finances. For most Groups it is very straight forward but help is on hand if needed and please always contact the Treasurer if you have any questions or concerns. The Treasurer manages the payment of room hire and other external costs (such as excursions and tour guides) and can also help on the best way to collect member payments for Group activities and budgeting etc. The Treasurer's email is [treasurer@locksheathu3a.org.uk](mailto:treasurer@locksheathu3a.org.uk)
- **Meetings at home:** For meetings that regularly taking place in a member's home, the Group should contribute towards the cost of providing refreshments etc (suggested £1 per session). Where meetings rotate between members' homes then this is not normally needed. Provided the amount collected is less than £20 in total there is no need to involve the Treasurer, but if in doubt please ask.
- **Meetings at hired venues:** For these it is necessary to ask members to pay to cover hire costs (this can be per meeting or for a quarter/half year etc). The money collected should be either passed onto the Treasurer or paid directly into our Group Bank Account, (details below), with the Group Lead keeping the cash. The Treasurer will then use the money to pay for the venue.
- **Initial attendance to groups :** For the first couple of attendances at an interest group by a member or visitor, the financial contribution should be waived so as to give that person the opportunity to consider if they wish to join the group on a regular basis.
- **Refunds:** Can be made, but not if it incurs a cost to the group or our u3a as a whole.
- **BACS and Card payments:** Our preferred method of collecting payments from members is by bank transfer (BACS) to our Group Account (**Locks Heath u3a, Sort Code 30-93-17, A/C no 6773 8860**). Members should be asked to use the Group name as the bank

reference. A Sum-up card machine is available for the Group Leads to borrow to collect Debit and Credit card payments. (The card reader is straight forward to use, but training is available). Note that the Group will be charged if the card reader is damaged or lost).

- **Cheques:** Cheques must be made payable to **Locks Heath u3a** and should be given to the Treasurer as soon as possible so that they can be banked. Please ask members to write the Group name on the back of the cheque.
- **Cash:** This should be avoided except for small (less than £5) payments. If more than £20 is collected then this needs to either be given to the Treasurer or paid into the Group Account.
- **Venue hire, Group activities and other purchases:** If you need to hire a venue for your meetings or need to purchase equipment or expect other costs such as guided trips then please inform the Treasurer before making any arrangements.
- **Record keeping:** Group leads are responsible for collecting and keeping a record of Group member's payments and chasing outstanding amounts. The treasurer will provide regular updates on the cash balance of the Group and any payments received by Bank Transfer (BACS) or Card payment. If any refunds are needed then please send a list with amounts, names and bank details to the Treasurer so that they can process the refund.
- **Beacon:** LHu3a uses Beacon to manage membership and finance, it also has a Ledger facility which can be used by Groups to record their income and expenditure. Please contact the Treasurer if you are interested in using this facility

### Paid Tutors

- The use of paid tutors is not normally encouraged as the u3a movement is based on the principle of self-learning. However, if you are considering using a paid tutor, due to their specialist knowledge, then you must discuss this with the Groups Liaison first. Please note that Tour Guides and Speakers who are used occasionally are not normally considered paid tutors, but if in doubt please ask.

### Shared travel

- Locks Heath u3a encourages lift sharing. Accepting a donation towards shared travel does not invalidate your vehicle insurance. The government encourages lift sharing and has made it clear that "petrol money" does not count as a taxi fare. Petrol would be around 15p per mile shared by the people in the car. Electric would be around 7p per mile.

### Gratuities

- It is preferable that any tip / gratuity is included in the initial cost of an event. Otherwise, a tip / gratuity should be a voluntary contribution collected by the outing leader from individual members and passed directly to the recipient.

### Conflict of Interests

- Where it is recognised, members should declare a conflict of interest.

### U3a Trust On Line Presentations

- There are a wonderful range of on-line one-hour presentations which are available via the national u3a trust website, and it can be a good idea to let group members know if there is a forthcoming presentation related to your particular group.  
<https://www.u3a.org.uk/what-we-do/events/educational-events>

May 2026

Review May 2029