



## THE UNIVERSITY OF THE THIRD AGE CRAWLEY

*Registered Charity No. 1029004*

### **GUIDANCE TO GROUP LEADERS**

#### **1. General**

- 1.1. Members making enquiries about your Group should be given information about the dates, time and place of meetings. If someone is unfamiliar with the area then the Secretary has a supply of maps.
- 1.2. Arrive early at a meeting to prepare the room and provide a welcoming atmosphere. Often a Secretary to the Group will ensure this is done, (see 2.1 below). Members too will offer their own welcome.
- 1.3. Start punctually and get straight into your topic for the meeting. From time to time, there may be notices that you are required to distribute, especially as our members do not meet as one Group and Newsletters and other information are mailed at quarterly intervals.
- 1.4. Encourage contributions from the members. A University expects members to take part in proceedings.
- 1.5. Give an outline of the topic(s) for the following session to enable any books or preparation members may wish to bring to that session.
- 1.6. Try to ensure that each member leaves with a sense of achievement and looking forward to the next session.

#### **2. Administration**

- 2.1. Appoint a Class Secretary unless you prefer to do the paper work yourself; please ensure that this is indicated on the account form so that the Treasurer knows who to contact should the need arise.
- 2.2. A Register is supplied to record names, telephone numbers, and record that you have seen the Membership Card for the current year. Newcomers are permitted to attend their first meeting with a Group without payment. They should be entered on the register separately as a visitor. Following this, they should be invited to contact the Membership Secretary in order to become a member of Crawley U3A and join the Group.
  - 2.2.1. To simply record the membership number without sight of the current Membership card is not proof of paid up membership.
- 2.3. When all the meetings for the year have taken place, or no later than the last meeting in July of each year, please send your completed register to the Hon. Treasurer.
- 2.4. The room and venue where a Group meets is booked by the Groups Coordinator. Where a Group meets in a Member's home, the arrangements may be made by the Group Leader. In both cases, the Group Coordinator is to be informed of meeting dates in advance.
- 2.5. If a meeting is cancelled, it is necessary to inform members. Meeting rooms are booked and often paid for far in advance. If a booked meeting is not to take place, please cancel with the venue as early as possible, and inform the Group Coordinator and the Treasurer who will be paying/or have already paid the rent.
- 2.6. If the Group has a waiting list of Members wishing to join it, then, if an existing Member of the Group fails to attend for three consecutive meetings without prior notice of a good reason for their absence (illness, medical appointment, away, or the like) the person at the top of the waiting list should take their place.

### 3. Finances

#### 3.1. Group Accounts

3.1.1. Two methods are in use for payment of Group meeting attendance fees, at each meeting a Member attends or in advance for a block of meetings irrespective of the number of meetings attended. The latter is the preferred method as room hire cost have to be met irrespective of the attendance at each meeting, it is therefore considerably cheaper for regular attendees.

3.1.1.1. Group Leaders in consultation with the Members on their Group Register are free to choose which method to adopt, a mixture of both methods is discouraged. However should a Group insist on adopting both methods it is essential that separate Group Account forms are completed for each method of payment

3.1.1.2. When completing Group Account Forms, please ensure that the Treasurer can determine the date for each meeting from the information on the form.

3.1.2. **Payment each meeting.** Groups where fees are collected each at each meeting, after four sessions account form should be completed and sent with cheque (if possible) to the Hon. Treasurer (Groups that meet weekly should submit every month, using the fifth line on the form when necessary). See the first example at the end of this document.

3.1.3. **Payment in advance.** Groups where fees are paid in advance for a block of meetings, the account form should be completed and sent with cheque (if possible) to the Hon Treasurer after the second meeting of the block. Any residue of fees may be included with the account form for the next block. Normally the duration for a block of meetings should be between one and three months (unless an alternative arrangement has been agreed with the Groups Coordinator. See the second example at the end of this document.

3.1.3.1. Some Groups do not normally use rented accommodation; nevertheless, use rented accommodation for two or three planning meetings per annum. Their Members pay a modest annual charge; this should be collected at the beginning of the academic year and recorded using the 'advance payment group account form'.

3.1.4. In any case, please return account forms by 14<sup>th</sup> March (in order that they may be included in the accounts for the year ending 31st March). They are also to be returned immediately after the last meeting prior to the Membership year end (31st July).

3.1.5. Please start a new Group account from for the first meeting on or after 1<sup>st</sup> August.

3.1.6. Groups that organise outings (note also paragraph 6.3) should complete a 'Name and Receipt List' and when appropriate a 'Record of Outing' & use a 'Day Outings Booking Form'

3.1.7. All monies paid by Group members and any goods purchased for use by a Group are the property of Crawley U3A.

3.2. **Refreshments** are arranged and paid for by members according to their own requirements.

3.3. **Outside Speakers, Special Facilities etc.** The first call on the Group Attendance fee is to cover room hire charges. If a Group wishes to use additional facilities, the associated costs are to be met by the Group members, unless the Committee has given permission for these to be waved. Such facilities include:- speakers/lecturers, notes available to the members, hire of equipment/facilities etc. Prior permission to purchase such goods or services must be sought through the Groups Coordinator.

3.3.1. Certain small expenses may be claimed from the money taken in at meetings. These include any postage, telephone calls (however see the clause 3.4), or photocopying and the like. Amounts up to £10 can be deducted from takings without obtaining prior approval, providing such payments do not bring the Group into deficit. Receipts should be obtained whenever possible for audit purposes.

3.4. **Telephone calls and emails** can be charged at cost as most contracts include provision for these to be made for no additional charge.

3.5. **Documents printed on Home printers** can be claimed at 10p for plain text per side of an A4 sheet, for details for other types of printing see Section on Expenses in the Operating Procedures (Section 18 of issue E).

3.6. Please note: It should not be necessary for a Group to close because expenses are not covered. Leaders will be reimbursed with any deficit in which case an ad hoc form will be supplied. Group Leaders, who are to be members of Crawley U3A, do not pay for attendance at their Group.

#### **4. Resources**

4.1. Requests for books/materials for use with a Group should be made to the Committee via the Secretary. These can often be bought at discount e.g. books. (This can also apply if members are buying the books)

4.2. A list of Resources/Assets of Crawley U3A is kept in a Resources Book and all items are marked with a book plate/logo.

4.3. Resources to use at Group meetings e.g. slides, videos, DVDs and redundant OU Courses are available on loan from the Resources Centre at the U3A National Office. The Third Age Trust has blanket permission from the copyright holders for these to be shown at U3A meetings. Before showing similar material see paragraph 6.5.

#### **5. Membership**

5.1. Membership can be renewed by post, or at the Enrolment Meeting held in September. This is a meeting when members can see the work of the Groups and perhaps make choices. It would be helpful if Group Leaders, or a representative, could attend that meeting to advise prospective new Members for their Group.

5.2. The Membership Secretary deals with all matters relating to membership and whom prospective members should be advised to contact.

#### **6. Other Matters**

6.1. Please contact the Hon. Treasurer with any enquiries regarding finances.

6.2. The Groups Coordinator should be consulted with any problems concerning the Groups and who will be pleased to assist.

6.3. When planning an outing/special event etc. please check with the Treasurer that date does not clash with another U3A event. In the case of outings/visits, see the separate guide – Appendix F “Day Outings or Visits” or “Outings with Overnight Accommodation”.

6.4. Dogs and Children at U3A Meetings, see separate guide.

6.5. Use of Films, Video Recordings and other Audio-visual Material within U3As. See separate guide.

Account form Example - Payment at each Meeting

**Example (updated version for September 2004)**

**Group Accounts for Crawley U3A**

When this form is completed, please return with monies to the Honorary Treasurer

Name of U3A Group ....*Digital Photography*..... Name of Group Leader ..... *E B Cowley*.....  
or Sender if different

Number of members on your register ...*15*.....

Date of Meeting	Number attending	Amount collected	Expenses (may include rent)	Balance	Total Balance
1) .. <i>4 Oct</i> .....	..... <i>14</i> ...	..... <i>£16.80</i> ..	.....	..... <i>£16.80</i> ..	..... <i>£16.80</i> ....
2) .. <i>4 Nov</i> .....	..... <i>12</i> ...	..... <i>£14.40</i> ..	.....	..... <i>£14.40</i> ..	..... <i>£31.20</i> ....
3) ... <i>4 dec</i> .....	..... <i>13</i> ...	..... <i>£15.60</i> ..	..... <i>£1</i> .....	..... <i>£14.60</i> ..	..... <i>£45.80</i> ....
4) .... <i>4 Jan</i> .....	..... <i>12</i> ...	..... <i>£14.40</i> ..	..... <i>£2</i> .....	..... <i>£12.40</i> ..	..... <i>£58.20</i> ....
5) .....	.....	.....	.....	.....	.....
Totals	..... <i>51</i> ...	..... <i>£61.20</i> .....	..... <i>£3</i> .....		..... <i>£58.20</i> ...

Please do not include any other Group(s) on this form. Signed .....

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For Treasurers's use only Cheque received and banked.....Treas.'s initials & date.....

Account form Example - Payment for a block of Meetings

The sample form shown below should have been completed and returned to the Treasurer soon after the second meeting in January, those of the 3 Members who had not paid by this date and pay later, would be included on the next form under 'residue from the previous period'.

Example (updated 26 Feb 2007)

**Group Accounts for Crawley U3A - for Payment in Advance**

*When this form is completed, please return with monies to the Honorary Treasurer*

Name of U3A Group .... Digital Photography..... Name of Group Leader ... E B Cowley...  
or Sender if different

Number of members on your register .....25.....

Residue from the previous period, from ...15 Sep..... to .....15 Dec....

Number of meetings .....7..... Number of Members .....2.... Amount £ ...11.20....

Current period, from .....5 Jan... to ...15 Mar.....

Number of meetings .....6..... Number of Members .....22.... Amount £ ..120.00....

*Please do not include any other Group(s) on this form. Signed .....*

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*For Treasurers's use only* Cheque received and banked.....Treas.'s initials & date.....