



u3a Dumfries

Charity number SC021683

Group Leaders Handbook

July 2026

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Introduction

U3a Movement

u3a Dumfries is an independent Registered Charity but is bound by its membership of the Third Age Trust (TAT) to operate within the guiding principles of the u3a movement.

The u3a movement adopts all requirements of non-discrimination contained or referred to in the Equality Act 2010. Its purpose is for people who are retired or semi-retired i.e. people in their 'third age' to come together in a friendly and informal environment to share their knowledge and skills and develop their educational, creative and leisure interests.

Roles & responsibilities

The Role of a Group Leader (GL)

The term Group Leader describes any member who offers to run a group. A Group Leader may simply be the main contact person for the group, or the organiser of the group programme. It is up to the volunteer to decide how they want to run the group, in consultation with group members. There may be one group leader, or the role may be shared with others, and this is to be encouraged but must ensure explicit sharing of responsibility. No payment is made for services rendered. All venues will be booked by the GL in the name of u3a Dumfries.

The Role of a Groups Coordinator (GC)

The Groups Coordinator is the committee member/s responsible for overseeing and supporting the interest groups and is your link with the committee and wider membership. The coordinator can assist with the practicalities such as finding suitable premises and will advise and support you if any difficulties arise. The contact details of GC can be found on the [u3a Dumfries website](#).

Meeting places

Venues may vary according to the needs of the group. Smaller groups are normally home based. For larger groups or those with specific equipment needs, rented accommodation may be required. Always make yourself aware of the local fire evacuation procedures and update your members regularly.

Risk assessments should be carried out whether meeting in rented accommodation, home based or outdoors.

Running costs

All venues are booked by the GL in the name of u3a Dumfries. Rental costs are paid for by u3a Dumfries, not individual groups. When heating and lighting costs are not included in the rent, the GL should contact the treasurer who will advise on how to claim for these. To avoid unnecessary costs, please remember to cancel room bookings if they are not required and notify the treasurer. If GLs want to book a different venue than those normally used by u3a Dumfries, permission must be sought from the Committee in writing using the **Request for a Room Booking** form, clearly stating the reason for the request. For any other cost, groups should be self-funding. If equipment provided by u3a Dumfries requires replacing or renewing, you must make a request in writing to the Committee for consideration. Do not purchase equipment and expect the cost to be reimbursed automatically.

Visits & outings

GL should complete a **Day trip request** form.

Visits and outings organised by groups must be self-funding. u3a Dumfries will not meet any loss. The whole cost should be taken at the time of booking to minimise the risk of cancellation. Monies collected should be paid into u3a in Dumfries Social Events and Travel account in order that the funds can be cleared in time for the Treasurer to pay the submitted invoice.

Disabled access

All u3as must take all reasonable steps to ensure that members with disabilities can attend the interest groups of their choice and offer them all the encouragement and support they need. If members require help to attend a group, they may be accompanied by a carer/companion. The carer/companion need not be a member of the u3a, but for the time they are in attendance will be covered by the Liability Insurance provided by TAT. The only exception to this is a professionally employed carer who would have to be covered by an individual Liability Policy. See **Equality, Diversity and Inclusion** policy document on the [u3a Dumfries website](#).

Starting a Group

First steps

If you are considering running a group, speak to the GC who will take your request to the Committee for approval.

You can publicise your group through the newsletter and email to members by the GC, to see what interest there would be in running a group on a particular subject.

If you expect the group to be meeting in rented accommodation, consult the advice in **Procedure for Booking Meeting Rooms**.

Details of the Group, e.g. Name of group, Group Leader's name, venue, meeting days, times to be added to Beacon by the Beacon Administrator, and to the website by the Website Administrator, both of whose contact details can be found on [the u3a Dumfries website](#).

After the Group is set up, then it can be publicised on [the u3a Dumfries website](#) and [Facebook](#).

You can then add members to the Group and send out emails to them via Beacon.

Valuable **Subject Advice** to support your group is available on [the National u3a website](#).

First meeting

Ground rules

Agree some ground rules e.g.

- Be punctual

- Listen to each other

- Allow others to speak

- Let someone know if you are unable to come

- Agree to disagree amicably and be respectful to other group members

- Every contribution matters

- Have patience with and encourage those who are slower to learn

After your first meeting, it is a good idea to feedback what was agreed to your Groups Coordinator to finalise arrangements and help you to update Beacon with dates of room meetings etc.

Meetings/Activities

Attendance lists

Some venues request that you keep a register of attendance because of fire regulations.

As required for insurance purposes, GLs should ensure that each person attending a group is a current member of u3a Dumfries or an invited visitor.

Visitors who are not already members of u3a Dumfries are allowed to attend a maximum of two meetings (by prior arrangement) but then they must become a member if they want to continue. The Membership Secretary will arrange this. Contact details are on [the u3a Dumfries website](#).

Catering arrangements

Venues have different catering arrangements. GLs should speak to the receptionist/caterer at each venue. Catering is self-funded by group members.

Accidents & incidents

In case of emergency, call 999/112 in the first instance, and check if any member has an up-to-date First Aid Certificate to assist. An **Accident/Incident Form** (available at [the u3a Dumfries website](#)) should be completed and sent to the GC, including details of witnesses.

Member emergency contact information is held on [Beacon](#) and is available to all GLs.

Cancellation

Update [Beacon](#) with confirmation or cancellation of room bookings as appropriate. This is important information for the Treasurer when paying invoices.

Advice

Leading walks & outdoor activities

If you are leading walks or other outdoor activities, make yourself aware of the advice available on [the National u3a website](#) particularly the **Walk Leader Risk Assessment Checklist** and **Safety on Walks**. Members should be informed that they join a group at their own risk and it is up to them to judge their fitness to undertake the activity.

A **Day trip request** form should be submitted at the beginning of each year. This is relevant to Walking groups and Gardening groups. A **Risk Assessment Form** should be completed prior to each event.

The forms can be found on the u3a Dumfries website at [the u3a Dumfries website](#).

Communicating with group members

Good communication with your group is crucial. Within [Beacon](#), there is a list of all the Groups and the members who have requested to join said groups. Emails can be sent to the list of members via [Beacon](#). Contact members using emails or WhatsApp where possible. When emailing members, use [Beacon](#) or the Bcc (Blind carbon Copy), in order not to reveal their email addresses. For members who do not have email, contact them by post or phone.

Insurance

Insurance is organised by the Third Age Trust (TAT) and covers:

Damage to the property of a u3a member whilst their home is being used to host a u3a interest group/meeting.

Loss or damage to property owned by the u3a wherever it is held and in transit. Equipment should be stored in a secure cupboard with a secure lock.

There is no insurance for personal accident, unless the u3a can be found to be negligent.

Licences

A Copyright Licensing Agency (CLA) licence allows the copying and re-use of extracts from digital and print books, magazines, journals and websites for educational purposes.

Through our membership of TAT, we have a CLA licence to play recorded music in public.

Videos can be shown for educational purposes only.

For further information see **Advice/ Licences** at [the National u3a website](#).

Problem solving

Sometimes issues can arise that disrupt the smooth running of a group and can spoil the enjoyment for everyone. Don't leave a problem too long before trying to resolve it. Talk to your Chairperson or other members of the committee if you are unsure how to resolve the problem or just want someone to explore options with. You can also contact [the u3a TAT Office](#) if you want to talk something through or check your understanding of a policy/procedure.

Issues between group members

Where there is potential for friction, it is advisable to begin by bringing it into the open. A GL may approach a GC for support in finding a resolution between members. Either the GL or the GC could try to facilitate a discussion either with the members concerned or with the whole group, but it is important that the facilitator remains neutral and non-judgemental.

If a situation does not resolve and becomes acrimonious, your committee is there for consultation. Follow the advice contained within **Disciplinary Procedure** and **Complaints Procedure**.

Help & Support

Group Leader meetings

These are held once a year and provide a formal opportunity for GLs to share information and ideas. If the GL is unable to attend, please arrange for a deputy or another group member to attend.

Beacon

Beacon is the system used by u3a Dumfries and should be kept up-to-date with group information. All GLs have access to Beacon to enable them to do this, as well as to contact their group members by email. GLs need to be set up by the Beacon Administrator who will provide them with a username and temporary password. Training will be given.

Beacon can be accessed at www.u3abeacon.org.uk

u3a Dumfries Website

Its purpose is to publicise our u3a and its activities.

It contains downloadable advice and policy documents as well as useful forms.

It also contains details of current groups on offer and can include one or more pages of information specifically about your group.

The Website Administrator will maintain it for you. <https://dumfries.u3asite.uk>

TAT – Third Age Trust

This is the National representative body of some 900 u3as in the UK and is funded by an annual Capitation Fee. It publishes the Third Age Matters magazine which can be a useful source of information for GLs. It also provides educational and administrative support to individual u3as and organises Summer Schools.

The Third Age Trust
52 Lant St.,
London SE1 1RB
TEL: 020 8466 6139

<https://u3a.org.uk>

Further information available from Third Age Trust

[u3a - Subject advice](#)

[u3a - Support for u3as Landing Page](#)

[u3a - Walking](#)

U3a in Scotland

U3a Dumfries is one of 50 u3as in Scotland. Trustees from u3a Scotland represent our interests on the UK NEC. u3a Scotland arranges study days, summer schools and an annual conference and AGM to which all Scottish u3as are invited.

<https://scotland.u3asite.uk>

Forms and advice available on u3a Dumfries website

<https://dumfries.u3asite.uk>

Forms and advice for Group Leaders

Accident/Incident Form
Day trip request
Procedure for Booking Meeting Rooms
Request for a Room Booking
Risk Assessment Form for rented accommodation
Risk Assessment for Home based Groups
Risk Assessment for Outings/Day Trips
Safety on Walks
Walk Leader Risk Assessment Checklist

Forms for New Members

Gift Aid Declaration
Membership Application Form
Standing Order Mandate

Forms for Existing Members

Gift Aid Declaration
Standing Order Mandate

Forms available on TAT website

<https://u3a.org.uk>

Other Risk Assessment forms

Policy Documents available on u3a Dumfries website

<https://dumfries.u3asite.uk>

Complaints Procedure
Disciplinary Procedure
Equality, Diversity and Inclusion
Member Code of Conduct
Membership Policy
Privacy Policy
Safeguarding