Group Leader Guidance

An essential guide for new and existing Group Leaders

updated October 2026

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1. Introduction

This document contains **essential information needed by a new Group Leader (GL)** and is a **good point of reference for existing GLs**. Sections 2 to 5 apply to all GLs, while the Annexes 1 to 4 apply in only certain circumstances, and many GLs will not need to refer to them. The document is kept up-to-date and the latest version can always be found here on our website.

2. Role of a Group Leader

How your role as a GL is carried out, and the workload involved, will very much depend on you, the nature of your group (e.g., outdoor activities, visits to venues, indoor sports, virtual meetings), and the members of the group. Some groups may have several people sharing the organisation. Some of the tasks of running a group, both relating to the topic (e.g., members researching a particular aspect of the topic – you may not need to be the expert on the topic), and to the practical tasks (e.g., booking accommodation, collecting contributions, phoning members who may not use email) can be shared among group members. Your Group Co-ordinator (GC) is available to advise you on how best to manage your role.

You should appoint a Deputy Leader from your group membership to be your GC's point of contact with the group in case you cannot be contacted, for whatever reason. Give the Deputy's contact details to your GC. GCs maintain a private record of Deputies' contact details. and these will not be publicised. As a second point of contact for your group, your Deputy should be given access to contact details for all members of your group, and for people on any waiting list for the group.

Your Deputy may take on other tasks to help with the running of the group, depending on your and his/her wishes, and the nature of your group, e.g., booking accommodations, tracking payments, as a second leader organising walks or outings, and/or as your back-up when you are not available for a group meeting. With their agreement, you can share any part of your role with your Deputy or with other members of your group.

Your Deputy may also be your logical successor if you choose to leave your GL role. You should plan well in advance, if possible, for your replacement in order to ensure continuity of the group and to minimise disruption. Notify your GC as soon as possible.

Groups are for paid-up members of the Edinburgh u3a (Eu3a). You should ensure that only paid-up members participate in your group by asking new group members for their Eu3a membership number on joining your group, and by asking all members to confirm their membership number annually thereafter. If you use Beacon (the membership database) to manage your group, you can easily check it to ensure your group members are paid-up Eu3a members, instead of asking them. As well as being fair to all, insurance policies can be invalidated if not all group participants are paid-up

members of the Eu3a. However, if a non-member is considering joining your group, you may invite them to attend one taster session. This one-off participation also applies to speakers who may have a particular knowledge to bring to a topic. For information on managing groups in Beacon, see the section 'Beacon'.

Along with communications from the Executive Committee to all Eu3a members (e.g., the Bulletin, the Clarion, Monthly Talk invitations), you may expect regular communications from Committee members (e.g., requests to confirm that you have or don't have vacancies in your group, requests to confirm or update your group's details).

2-1. Communication with Group Members, Other Eu3a Members, and the Public

In order to manage your group, you will need to communicate with them regularly by email, telephone, or a WhatsApp group, should you wish to create one. You should maintain a list of each group member's name, membership number, e-mail address, phone number, and their emergency contact's e-mail address and/or phone number. (You should have your group members' emergency contact details available during all group activities.) This information may be used only for group business and must be deleted when a member leaves the group or when the group is disbanded. If you leave the GL role and another takes over, the list should be passed to the new GL.

Contact details may be shared with other group members, with their consent. The Group Leaders Data Protection Form can be used to record these permissions. A link to the form can be found under Group Leader Documents and Forms on this page of the website. If a group member does not consent to sharing their contact information with other group members, you must always use the blind copy address (BCC) for emailing them and/or have them create a different WhatsApp account name. Remember that not all members are online and you may need to keep in touch by phone.

Occasionally, GLs may need to record dietary or access requirements in preparation for an activity that may include eating or travelling. This information may be passed on to venues, restaurants, or coach operators with the member's consent where necessary. Be sure to pass on only the details the third party genuinely needs.

The website allows members of the public who are not Eu3a members to send e-mail messages to GLs, although this is likely to be rare. The message will usually make it clear if the enquirer is an Eu3a member or not. If there is any doubt, you could reply by asking for the enquirer's membership number or check with the Membership Secretary or your GC, who both have access to Beacon. If you use Beacon, you can also check there.

You should always reply to enquiries from Eu3a members, and to any genuine enquiries from non-members, as this may be their first contact with the Eu3a. Occasionally, e-mails from the public may contain unsolicited messages from sources

promoting holidays etc. These can be deleted without reply.

2-2. Monitoring attendance

Keep a record of attendance at each meeting. A link to the List of Members and Attendance Form can be found under Group Leader Documents and Forms on this page of the website or you may create your own system. Don't allow long-term non-attendees, or very infrequent attendees, to hold on to places which those on the waiting list would like to have. You should advise these members that they are blocking others from joining the group and suggest that they leave the group. They may wish to be put on the waiting list to rejoin the group when there is space and their availability is greater. When vacancies arise, invite those on the waiting list to join the group in order of application. See the section 'Dealing with Demand' below.

When you have a lengthy or stagnant waiting list, contact your GC, who may ask to attend one of your group meetings to encourage group members to consider putting themselves forward as a GL for a new similar group. As well, you can invite those on the waiting list to put their name forward as a new GL for a new group. Your GC will then support prospective GLs in establishing and managing a new group.

2-3. Dealing with Demand

It is often difficult for new members to find groups with available spaces. If your group is full, you should tell the enquirer that their name will go on a waiting list, and you should give them an idea of how long it might be before a place is available.

If a group has vacancies, this should be listed in the monthly Bulletin in response to the regular requests for information from the Bulletin Editor. At any time, vacancies can also be highlighted in your Group page on the website.

2-4. Accommodation

The Groups section of the website can be searched by venue. This will give you a good idea of venues currently in use by existing groups, some of which may charge a fee (see the section 'Financing' for more information on accommodation fees). They may include rooms in public libraries, church halls, relevant society venues, cafés and pubs, sports facilities, and outdoor locations (for outdoor activity groups). You may contact the venue directly for information on their room availability and any hire fees. Where group numbers permit, many groups meet in the GL's or another member's home.

If you need to hire a venue, consider the cost, access arrangements, the group's size, and its needs (e.g., chairs, tables, equipment including induction loops for people with hearing impairment, room for physical activities, buses, parking, toilets, refreshment facilities, etc.). Some groups may be required to sign an agreement for the hire of a hall or other venue and may be required to pay by direct debit with funds collected from the group members. You must contact your GC if you are considering such an arrangement, as a member of the Eu3a Committee is required to sign the agreement.

If a group meets in the GL's home, a minimum of £1 per member is usually paid to cover refreshments. When there are charges for e.g., accommodation, materials, photocopying, these need to be built into the cost of the group and passed on to group members.

Outdoor activity groups usually use public transport but, occasionally, car-sharing will be required. In this case, passengers should make a contribution to be determined by the GL.

2-5. Safety of Members

There is no legal requirement for formal written risk assessments of Eu3a activities. The Third Age Trust (TAT – this and subsequent occurrences of 'TAT' take you to the Third Age Trust section in this document) has provided some common-sense checklists which have been adapted for Eu3a use. A link to the Home Safety Checklist Form can be found under Group Leader Documents and Forms on this page of the website.

Members are ultimately responsible for their own safety, and you should ask them to confirm that they are fit enough to attend active groups. Relevant GLs should insist that, as a condition of membership in the group, all participants sign a Disclaimer Form, a sample of which can be found under Group Leader Documents and Forms on this page of the website.

Similarly, and particularly for those groups that meet indoors, members should not attend group meetings if they feel unwell in order to avoid infecting others.

In the event of an accident during a group meeting, you are required to let your GC know and to complete an Accident or Incident Report Form for the GC to share with the Committee. A link to the form can be found under Group Leader Documents and Forms on this page of the website.

2-6. Difficult Issues and Safeguarding

Occasionally, difficult issues may arise. You may find it helpful to discuss these issues within your group first. You should certainly talk to your GC if any group member has a complaint of any sort, and you might consider contacting the Secretary. This is especially important in the unlikely event that you have any inter-personal difficulties with a member of your group or if you feel there may be a safeguarding issue.

Safeguarding is a term used to describe how we protect adults from abuse and neglect. It is an important, shared priority of many public services. Safeguarding is about protecting certain people who may suffer in vulnerable circumstances.

Safeguarding is everybody's business, and in line with this, the Eu3a has adopted a Safeguarding Policy and takes responsibility for the wellbeing of members. The policy and a Complaints Procedure can be found under Safeguarding and Complaints Documents on this page of the website.

2-7. Paperwork

You will find links to the forms mentioned above and to the other forms which may be useful to you under Group Leader Documents and Forms on this page of the website. Forms include the New Group Approval Form*, List of Members Form, List of Members and Attendance Form, GLs' Data Protection Form, Home Safety Checklist Form, Disclaimer Form, Accident or Incident Report Form*, Expenses Form*, and the Group Funding Application Form*. You can modify most of these forms to suit your own circumstances but check with your GC first.

*The starred forms should not be modified other than by the Committee.

2-8. Sharing your group's achievements

It is important to the Committee that your achievements are shared within Eu3a. We are always looking for reports and photographs about your activities for the Clarion, the website, and the Facebook page. Ensure that your group members are offered the opportunity to be excluded from photographs if they prefer.

Eu3a Committee members are very interested in any ideas or suggestions you may have, and your GC can raise them for you at a monthly Committee meeting.

3. Support from your Group Co-ordinator

Every group is supported by one of five GCs (GC1 – GC5), each of whom is a committee member, and each of whom is allocated a portfolio of groups according to the first letter of the group name as follows:

GC1: A-C gc1@edinburghu3a.org.uk

GC2: D-I gc2@edinburghu3a.org.uk

GC3: J-P gc3@edinburghu3a.org.uk

GC4: Q-S gc4@edinburghu3a.org.uk

GC5: T-Z gc5@edinburghu3a.org.uk

To contact your GC please always use their generic email above as it will be automatically directed to the person who is currently occupying that position, or use the Contact Form on the Contact Us page on the website.

Your GC is available to supply additional information, offer advice on your various responsibilities, assist with problem-solving, handle group funding requests (see the section 'Group Funding Requests'), and help in any other appropriate way. He/she may pass on news or information of special interest to particular groups, from TAT or other sources.

As well, your GC ensures that the publicised information about your group is accurate by reviewing the information, seeking clarification from you where necessary, and responding to your requests for changes. If you wish to be given access to make changes to your group page yourself, contact Internal Communications. The Bulletin includes group updates, group vacancies, and details of new and suggested groups. It is emailed monthly to all members who have an e-mail address.

As the link between you and the Executive Committee, your GC will make the Committee aware of any Accident or Incident Report form received from you.

He/she will be very happy to know how your group is doing whatever stage it is at and will welcome feedback from you.

4. Technology

4-1. The Website

The Eu3a website is the primary source of information. The Groups page lists all groups alphabetically, and gives options to display groups by category, by meeting day, and by venue, highlighting those with vacancies. Groups pages are updated regularly, based on information provided by you. Please ensure that you contact your GC whenever there are changes to your group information. He/she will then update your group page, unless you have chosen to do it yourself.

4-2. Beacon

You and your Deputy may wish to take advantage of Beacon, the Eu3a membership database, to simplify administration of your group. This allows you to replace manual group member lists and mailing lists, to manage waiting lists, and to confirm that group members are paid-up members of the Eu3a.

If you choose to use Beacon, the Internal Communications Committee member can give you access. You may book a Beacon training course on Zoom on this webpage or get a short introduction to using the program from your GC or another Eu3a Committee member.

5. Financing

Groups should be self-financing, with each member meeting a share of any costs of room hire, materials, refreshments, etc. That being said, one-off group funding is available under certain circumstances. See the section 'Group Funding Requests' below. Payments should not be made to u3a members for anything other than expenses, for which receipts need to be submitted.

Reasonable travel expenses can be paid for speakers at group meetings. Where speakers use public transport, they should provide a receipt/ticket. If speakers use their car, petrol costs can be reimbursed. Any costs paid in this way should be from group funds.

Contact the Treasurer with any financial queries or for expense claims. A link to the Expenses Form can be found under Group Leader Documents and Forms on this page of the website.

Groups which have accommodation and other significant costs, should maintain basic records of all income and expenditure to share within the group, and submit them to the Treasurer at the end of the year. Groups should not hold more than £200 at any one time. If you anticipate holding more than £200, or don't want to deal with money, or have any questions on managing cash, BACs payments, banking, etc. for your group, please contact the Assistant Treasurer.

5-1. Group Funding Requests

A grant may be available for things like accommodation costs to support the first few meetings of a new group while numbers are being finalised, first-aid training, professional tuition or coaching, books, initial magazine subscriptions, etc. You can submit a request for this to your GC and the Eu3a Treasurer. A link to the Group Funding Application Form can be found under Group Leader Documents and Forms on this page of the website.

A laptop, projector, and screen are available to borrow on an occasional basis. A portable sound system is also available. Contact the Technical Support Officer for details.

Annexes – Information in the following annexes applies in only very specific situations. It is included here, in case you need to refer to it.

A1. Taking Trips

Groups may organise their own daytrips. TAT provides insurance cover for these, e.g., those organised by the various visits groups.

The Eu3a Committee does not support overnight (or longer) trips. That said, any Eu3a group or its members may still organise overnight (or longer) trips, but must be aware of the following:

- Such trips are completely independent of the Eu3a and entirely the responsibility of the participants. Participants should take out their own personal travel insurance.
- It is recommended that these trips be organised through an accredited travel agent or tour company to whom payments should be made directly.
- As they are not endorsed by the Eu3a, these trips will not be advertised or promoted through any publicity channels used by the Eu3a. However, groups may still mention in general terms on their Group page on the website that overnight trips may be possible (subject to the conditions above).
- As these are not official Eu3a activities, non-members, e.g., members' partners, can participate.

A2. Insurance essentials

TAT provides insurance which covers all Eu3a groups. Insurance cover is renewed annually on January 1st and a brief description of the latest cover relevant to GLs is given below. The full description of the cover, including limits and exclusions, is provided on the TAT organisation's website. Their Insurance FAQs are particularly useful.

A2-1. Public and Products Liability

This indemnifies all Eu3a members against all sums we could become legally liable to pay as a result of accidental injury to or death of any person. Also covered is accidental loss or damage to material property not belonging to you, which arises in connection with the activities of the Eu3a.

As stated above, day trips are covered by the public liability insurance.

A2-2. Money Cover

Note that cover is not provided for small amounts of Eu3a cash held in members'

homes or hired premises, or in transit.

A2-3. All Risks Equipment Insurance

This provides cover for loss or damage to property owned by the Eu3a, excluding wear and tear, depreciation, and gradual deterioration, wherever it is held, and in transit, providing due diligence is observed and reasonable precautions are taken to ensure it is stored securely. This includes items on loan to the Eu3a. Whilst at any premises other than the home of any member, the equipment must be kept in a locked cupboard or room when the premises are not in use by the Eu3a.

Note that any equipment used by groups which has been purchased from their own funds or donated to them is deemed to be owned by the Eu3a and so is covered by this insurance.

A2-4. Home Contents Cover

This covers damage to the property of any Eu3a member when their home is being used to host an Eu3a activity.

A2-5. Tour Operators' Liability

As stated above in Trips, the Eu3a does not support overnight trips, so this insurance cover is not available to Eu3a groups.

A2-6. Claims

In situations that might result in an insurance claim, you should not admit liability or fault on the part of yourself or other group members, even where you believe that this is the case. Also, in the event of any claim, the Eu3a is responsible for paying the excess.

A3. Understanding Copyright

A3-1. Photocopying

The Eu3a has a licence to photocopy parts of books and magazines in copyright. This is within clearly defined limits of extracts to 5%, one chapter or one article, whichever is the greater. Sheet music within copyright must not be copied. There is a licence to copy entire works for visually impaired members.

A3-2. Media Sources

You can use DVDs or videos for educational purposes. TAT has a licence to allow groups to show films distributed by the Motion Pictures Licensing Corporation and Media.

A3-3. Recorded Music

TAT has a Phonographic Performance Ltd licence, which enables members to play recorded music in public as part of a group.

A3-4. Performance

A Performance Rights Licence is the responsibility of any venue where a public performance is made. If you are arranging a performance, this should always be checked with the venue operator.

A4 Other Resources for Group Leaders

A4-1. The Third Age Trust (TAT)

The Third Age Trust, based in 156 Blackfriars Road, London SE1 8EN, is the national representative body of more than 1,000 u3as in the UK, and supports the work of local u3as by providing guidance and administrative support to individual management committees and by arranging significant provisions such as insurance. Through TAT, all u3a members have access to a free 24-hour Legal Help Line – contact the TAT office on 0208 466 6139.

A4-2. Distance Learning

You may find free online courses useful. There are now thousands of Massive Open Online Courses (MOOCS), produced by universities and colleges. Useful providers are Future Learn and Coursera. Most courses are short duration, and the material is usually available on a long-term basis, enabling groups to use it at their own pace.

A4-3. Subject Advisors

National u3a Subject Advisors will give support and encouragement on the basis of their experience in their own groups. You can see their areas of expertise here. A list of Subject Advisors is also in each issue of Third Age Matters, TAT's magazine.

A4-4. Shared Learning Projects

A Shared Learning Project allows u3a members to work in partnership with an institution such as a museum, gallery, university, library, or archive. A group of members would offer time and expertise in return for the opportunity to engage in research or some other enterprise to the benefit of all involved. See the TAT website here for more information.