

Dronfield and District u3a
Group Coordinator Guidance
Version 1.2

Date Approved: 20 April 2026

Next Review: not later than April 2027 (annual review required)

1. Introduction

- a. This guidance is to help you when you are coordinating an Interest Group. Your Groups Manager (groups-manager@dronfieldu3a.org.uk) is available to offer help including advice on starting a group. Further advice is available in documents on the Third Age Trust (TAT) national u3a website. See Section 8 for how to access the site.

2. Organisation of your group

- a. Provide adequate information (DDu3a Website, newsletter, flyers, DDu3a monthly meetings, Beacon group descriptions and calendars) to enable prospective members to make an informed decision about joining.
- b. Use of the Beacon management system is recommended for maintaining secure records of the group's membership which comply with DDu3a's Personal Data Management and Privacy Policies. Contact the u3a's Systems Administrator (beacon@dronfieldu3a.org.uk) for advice with using Beacon.
- c. Agree meeting frequency, dates and times with members and publish these accordingly.
- d. Ensure everyone in the group is a current member of DDu3a. Guests and visitors are not permitted unless they are potential new members. Potential members may attend for up to three DDu3a sessions (group and/or monthly meetings). Record details of any non-member attendance and inform them of the need to join DDu3a to continue attending.
- e. Participation in any group activity is at a member's own risk. TAT provides Public and Products Liability Insurance that indemnifies all DDu3a members against various sums (with excesses) they could become legally obliged to pay as a result of accidental injury to or death of any third-party person and accidental loss or damage to material property, in connection with the activities of DDu3a. This insurance does not provide any personal injury cover.
- f. A member's carer or support companion may attend. A member who has caring responsibilities for another adult may bring their supported adult. For insurance reasons, carers and cared for adults who attend meetings will, with the explicit agreement of the Executive Committee, be given complimentary (free) membership of DDu3a.
- g. Only adults are allowed to attend Interest Group meetings or DDu3a events. The attendance of children is not covered by the TAT insurance.
- h. Members of DDu3a, or any other u3a, cannot be paid for their services. Paid external (non u3a) speakers are allowed on an occasional basis.
- i. Paid tutors are not allowed. If a group wishes to use a paid tutor e.g. for a specialist activity such as Yoga or keep fit, they must arrange to meet outside of the u3a organisation.
- j. DDu3a holds copyright licences and other permissions for the use of printed, audio and video material for educational purposes at group meetings and events. (See section 8)

- k. Remember that not all members use computers so offer to communicate by phone and mail. Obtain permission of a member before giving out their address, phone and email contact details to others. If using email, ensure to send as **bcc** unless all members have agreed to share email addresses. Get a member's explicit permission before adding them to any social media groups used for communications (eg WhatsApp, Signal).
- l. Maintain a waiting list if the group reaches maximum capacity (this can be done on Beacon). If there are enough members waiting to justify starting a second group contact the Groups Manager for advice.

3. Safety

- a. A risk assessment is required for all groups, irrespective of where and how they meet ie in person or online. Contact the Groups Manager for information about what type of risk assessment is needed and who needs to approve it. Once it has been approved provide all members of the group, and any new members who subsequently join it, with either a printed or digital copy. The Risk Assessment must be updated, and re-issued to the group's members, if any significant changes happen within the group eg if the Coordinator or meeting venue changes, or after an accident or incident has occurred at a meeting (see section 4.h).
- b. Identify any accessibility needs of members such as disabilities, impaired vision or hearing and take these into consideration when deciding on a meeting venue. Be aware that DDU3a has Equality, Diversity and Inclusion, and Safeguarding policies (see section 8)
- c. Remind members of their individual responsibility for their personal health and safety and to consider the health and safety of other members.

4. Conduct of Meetings

- a. Ensure that the venue and facilities are in a suitable state before the start of the meeting. If there are any safety or access concerns the meeting must be cancelled. Advise members in advance if possible.
- b. Keep a register of attendance at meetings. Attendance records must be kept for a minimum of twelve months and they must be destroyed in accordance with the DDU3a Personal Data Management policy.
- c. Encourage members to let you know if they are unable to attend a meeting. Check with members who do not attend regularly. Ask if they are willing to leave the group so that any waiting list members can join.
- d. Encourage active participation by all group members and shared responsibility for the running of the group. (Sharing the Coordinator's role and duties works well). Try a range of approaches in terms of content and activities where appropriate so that all members can benefit.
- e. Remember that not all members have the same level of skill, expertise or fitness and have joined the group to learn and share their experiences. Welcome new and prospective members to the group and consider their confidence in meeting new people. No DDU3a members should be excluded but the level of the group, such as beginners or improvers, should be explained in order that they can assess whether the group meets their needs.
- f. Ensure that all members are involved in decisions concerning the group's programme of activities or topics.

- g. Respect members' privacy. Do not allow discussion of members' personal situation or health unless they are happy to divulge information.
- h. Any accidents and incidents must be reported to the DDU3a Chair using the DDU3a Incident Report form (available on the [Members' Area](#) of the website). Advise members to have their emergency contact details available on their person at any DDU3a activity, and to advise the meeting host of any emergency equipment they may carry with them. Most members have given emergency contact details which are available on the Beacon members' records. Availability of a mobile phone with data/internet access is advised especially for outdoor activities.
- i. If a conflict arises between members, they should agree to disagree amicably and show respect for other member's views. If a complaint or a problem arises within the group it should be dealt with as soon as possible, seeking the advice of the Groups Manager in the first instance. If matters become serious it must be taken to the Executive Committee using the DDU3a Incident Report Form for resolution.

5. Finance

- a. All groups must be self-financing e.g. venue costs, resource materials, cancellation fees etc.
- b. Incidental costs incurred by a group such as printing, copying or for refreshments must be met directly by the group without recourse to the Treasurer.
- c. Group funds belong to the u3a, not to the group's members, and have to be reported annually in its Report and Accounts. If a group closes, any accumulated funds must be returned to DDU3a and not to the group's members.
- d. Never open a group bank account and restrict cash held to the limit detailed in the DDU3a Finance Policy. Larger amounts must be transferred to the Treasurer.
- e. Cash collected from group members may be paid into a coordinator's personal account for transfer to the DDU3a bank account using a cheque or electronic bank transfer. Whenever this is done the Treasurer must be contacted (by telephone or a covering email) explaining the transaction, and for advice on the procedure to be followed. Members' cheque payments must be made payable to Dronfield and District u3a, not to the Coordinator.
- f. Always provide a receipt for monies received in advance of a meeting or event. It is not necessary to do so when members pay at each attendance.
- g. Keep a record of all financial transactions made into and out of the group's funds. The record should include payments made from and to members for group related activities as well as any payments to, and receipts from, third parties e.g. when paying for a meal and the organiser receives a combined receipt as a record.
- h. Financial records must be kept securely and made available to the Treasurer for audit and annual reporting purposes.
- i. It is recommended that groups use Beacon, which provides a group ledger facility, so that all transactions are recorded centrally and are easily available to the Treasurer.

6. Booking a Venue

- a. Contact the Groups Manager for details of venues available locally and advice on bookings as procedures may change.

- b. Select a suitable venue, agreed with members, with agreement as to how costs will be covered for non-attendance, withdrawal from the group and cancellation fees. Payment in advance to cover booking of a venue e.g. for three meetings is strongly recommended.
- c. Obtain receipts for any fees paid if direct payment is made on the day of the meeting.
- d. For advance bookings of venues, arrange the booking directly or through the booking agent, using email, phone or the venue's on-line booking service as required.
- e. Confirm the booking in accordance with the venue's procedures. Obtain a copy of the venue's terms and conditions and risk assessment and ensure that you can comply with it. Once a date and time is confirmed, ask that an invoice is sent to the DDU3a Treasurer for payment.
- f. DDU3a will support initial expenditure for all new groups by paying the cost for the first room hiring.

7. Meetings involving Members' Transport

- a. Where vehicles are used for journeys undertaken for DDU3a activities, transport costs may be shared for both economic and environmental reasons. It is the responsibility of participating members to satisfy themselves that the owner/driver of the vehicle has adequate insurances.
- b. The cost of fuel can be voluntarily shared without detrimental effect on the car driver's insurance. Parking charges should also be shared.
- c. If a group wishes to use a mileage charge, please consult the DDU3a Treasurer for advice.

8. Additional resources

- a. For relevant policies and procedures please refer to the [Members' Area](#) on the DDU3a website or by contacting the Groups Manager.
- b. Additional advice for group coordinators and details of TAT insurances and copyright licences are available on the u3a National website (www.u3a.org.uk). Contact the Groups Manager for further information.

Document History		
Date	Version	Summary of Changes
20 Apr 2026	1.2	<p>Obsolete reference to Policies page of the website removed. Version number and next review date updated.</p> <p>Para 1a Obsolete instruction to contact Groups Manager for advice on how to access TAT website removed.</p> <p>Para 2f "Guests and visitors are not permitted..." moved to 2d. Subsequent paragraphs renumbered.</p> <p>Para 2j Copyright licence holder corrected from TAT to DDU3a</p> <p>Para 2k Reminder to get members permission before adding them to social media groups added.</p> <p>Para 3a Reworded to include online meetings and reflect current procedures.</p> <p>Para 4b Attendance registers to be kept for twelve months, not three.</p>

		<p>Para 4h Reference to Polices page of website changed to Members' Area.</p> <p>Para 5f "Payment in advance to cover booking of a venue..." added to para 6b.</p> <p>Para 8a Reference to Polices page of website changed to Members' Area.</p>
19 Aug 2024	1.1	<p>Policy to be reviewed annually</p> <p>Hyperlinks to DDU3a's old website removed throughout document.</p> <p>References to DDU3a Secretary removed throughout document.</p> <p>DDU3A changed to DDU3a throughout document.</p> <p>Sub paragraph numbers added for clarity.</p> <p>Paragraph 2.g changed to clarify entitlement to complimentary memberships.</p> <p>Paragraph 2.i Modified to clarify that DDU3a members, and those of other u3as cannot be paid for their services.</p> <p>Paragraph 3.a Contact details for Health and Safety Officer added.</p>
21 March 2022	1.0	<p>This document supersedes previous DDU3a documents: Interest Group Protocol V10 and Guidelines for Group Coordinators V6</p>