

Starting up a u3a group; checklist for group leaders.

1.0 Group name:

2.0 Group remit (information and activities):

Question?	Answer!	Done
What is the purpose of the group?		
What will your role be in the group?		
What do you want group members to do?		
Notes: Will you teach and/or facilitate participation? Do you want participants to lead sessions, share experience, help plan, or simply participate? Will you delegate tasks such as finance and administration? Is the group fun or competitive? Is there an end point, or is it ongoing? What information would you want to know, if you were thinking of joining this group?		

3.0 Group remit (people):

Questions?	Answers!	Done
Number in group (maximum and minimum)?		
Experience required?		
Fitness level?		
Ability or knowledge?		
Notes: 		

4.0 Planning

Questions?	Answers!	Done
How often?		
Day and times?		
Venue?		
Equipment needed?		
Notes: Check out other activities in the "By meeting day" listing of Groups on the website u3a Groups, so that you can choose a day and time that conflicts least with other activities. It's impossible to completely avoid clashes though. Small groups often meet in members' homes, but there are a number of venues well-used by Southwell u3a. For further information on venues, potential charges, and equipment available, see: Group Leaders Section For the first meeting, Southwell u3a will cover the room hire charge and any associated costs. You can also apply to Southwell u3a for monies to cover set-up costs (previous groups have had funding for pickleball paddles, climbing ropes, and kurling rocks). Please contact the Groups Coordinator from the u3a website Contact Page Equipment, such as projectors or sound systems, may already be available from the u3a. For a list, see: Group Leaders Section		

5.0 Gaining expressions of interest

Activity	Done
Sound out potential interest by sending an outline of your proposed group (see 2.0 and 3.0 for content) to the Newline Editor u3a Contact Page . The deadline for copy is the 10 th of each month. Include your contact details, and a photograph or graphic if possible.	
Explain your ideas for the group at the monthly meeting, or ask the Groups' Coordinator to make an announcement on your behalf. Sit at the Groups' Table during the break to talk to, and sign up (record their contact details!), interested members.	
You can also ask for expressions of interest through the Southwell u3a internal Facebook page. To do this, contact Facebook Administrator	
Notes: If you'd like help with your Newline article, send it to Groups Coordinator no later than 3 days before the Newline deadline, and we'll return it promptly with any suggestions.	

6.0 Your first meeting

Activity	Done
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Contact interested members to let them know of a date and venue for the initial meeting/taster session of the group.	
At the first meeting, collect contact details of all members who are interested attending further meetings.	
If you have planned to delegate tasks, ask for volunteers at this first meeting.	
Agree and confirm venue, dates, and frequency of future meetings.	
Notes:	

7.0 Ongoing

Activity	Done
Send a brief description of the group, along with any photograph, to the Webmaster . He will create a web page for your group.	
Send the details of the groups (as above, but no photos) along with the group members' names, to the Beacon Administrator who will add the details into the Groups section of our Beacon database. You can then keep this up-to-date yourself, adding or deleting members details as they join or leave the group.	
Complete a risk assessment for the group using the appropriate template from the Risk Assessment Checklist Circulate it to all group members. Send the final version to the Webmaster , who will add it to your group webpage.	
Send a brief description of the group to Groups Coordinator so that we can create and printout a sheet for your group and advertise it alongside all others at the monthly meeting.	
Have a look at the Group Leaders Handbook which contains further information on setting up and maintaining groups.	
Notes: If you are unsure about using Beacon, the Beacon Administrator is always happy to help. Once you have set up your group, you will have the contact details of all members in your group. Please do not share these contact details until you have permission to do so from the members of your group. Until then, you can use either the email facility on Beacon (which is completely confidential) or send standard emails but using the 'Bcc' facility. Permission to use photos of the group members (e.g. for the website or Newline) should also be sought before submitting them.	

8.0 Finance

There are a number of financial considerations to address (see below) before starting the group.

Questions and 'To Do'?	Answers!	Done
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Calculate ongoing costs (e.g. venue hire or incidentals) and divide them up between members attending meetings. What will you need to charge each member, per session?		
Prior to, or soon after, your first group meeting, contact the Groups Treasurer who he will be happy to arrange a meeting to discuss finance management.		
Notes: Groups must be self-financing. They must not incur any deficit. Records must be kept of monies collected and paid out. Group leaders should not hold large reserves. Best practice suggests you collect money for several meetings in advance which gives you security when booking venues and commitment from members. Detailed information on managing group finances can be found here		

If you have any questions, or would like help with any of the above, please contact the [Groups Coordinator](#)