u3a

Up Holland & District

Group Leaders' Handbook

February 2026

u3a Up Holland & District

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Thinking of Starting a new Interest Group?

The success of our u3a depends on everyone taking part and on some people leading a group. Many interest groups or activities do not require the Group Leader to be the expert. They do need someone who will organise and be responsible for running the group in line with the ethos of u3a. i.e. We're all volunteers who want to learn, laugh and live.

These are a few tips - some of which we hope that you find helpful:

- Borrow a group leaders handbook to find out useful information – available from the Group Leaders' Co-ordinator or Secretary. Their contact details are in the Year Book.
- Look at the calendar of events to find sessions that do not have too many clashes with your activity.
- Consider the size, availability, convenience and the cost of the premises you need to hire.
- Calculate the interest group fee which is calculated on the cost of room hire, refreshments, printing and any equipment you may need. A small start up fund is available, which needs to be paid back. The session fee varies across our u3a and depends on the activity. The idea is to cover costs and any profit made goes back into the group. A record of accounts must be kept, along with receipts for expenditure. Help with this is available from the treasurer/assistant.
- Consider health and safety issues e.g. checking premises for potential hazards before a meeting, know the fire procedures for the premises, check for hazards and the suitability for the ability range. Complete a risk assessment checklist.
- Hold an initial meeting with those who have shown an interest to discuss the purpose of the new group, the programme, roles and responsibilities (including a deputy leader or steering group), the session day and time and the cost to members.
- Collect contact information from each member of your group e.g. phone numbers, emergency contact numbers, membership number and email address. These are confidential.
- Be aware that u3a insurance covers you for public liability but not for accidental injury. The public liability covers all group members who are members or on a taster visit and may be compromised if there are other people taking part. An instructor cannot be paid except in special circumstances and approval sought from the committee. Further information about this is on the national website.
- u3a national website also has some information on interest groups and subject matter.
- Contact the Group Leaders' Co-ordinator or a Committee member to discuss your plans before you start and then the newsletter editor or secretary to have information printed in the newsletter.

GROUP LEADERS, DEPUTIES & GROUP COMMITTEE MEMBERS GUIDELINES

GROUP LEADERS, DEPUTIES & GROUP COMMITTEE MEMBERS:

- do not need to be an expert to lead a group – help is available and will be given if required – but some leadership skills would be an advantage.
- should attend the monthly coffee mornings and Speaker meetings to provide an information point for members
- should attend Group Leader's meetings or send a deputy or one member of the group as a representative & duly report back to the group
- work with the Committee and the GL Co-ordinator regarding all aspects of their group including all queries, over-subscribed situations and new group formation
- keep the members' register up to date and accurate at each and every meeting and to ensure Tasters and Visitors names are duly recorded.
- keep an account of all monies and receipts, and to deposit any income with the Treasurer. This is detailed further in item 8 of this handbook.
- keep a list of current members' personal details incl. emergency contact numbers with due regard to Data Handling Principles
- be mindful of Health and Safety issues & Risk Assessments. (see appendices). These checklists can be used as a reminder of the potential risks.
- must sign the Data Protection Agreement and return to the Secretary

There are further guidelines and helpful information available on the National website. (www.u3a.org.uk)

A STEP GUIDE IN AN EMERGENCY SITUATION

GUIDELINES FOR GROUP LEADERS

1 DON'T PANIC

2 Mobile [if available] to be fully charged or use nearest telephone

3 Dial 999 for emergency or 112 from a mobile (this will give emergency services your precise location using Advanced Caller Location)

4 State position / location incl. postcode e.g. >

St Teresa's club, College Rd, Up Holland, WN8 0PY

OR

Road details/map reference

5 State Gender & brief details of the problem

6 Keep the member warm & comfortable whilst waiting for assistance

7. Have the member's name and personal details available including emergency contacts

DON'T ATTEMPT TO ADMINISTER ANY MEDICAL INTERVENTION UNLESS YOU ARE MEDICALLY QUALIFIED TO DO SO.

DATA HANDLING PRINCIPLES FOR TRUSTEES/MEMBERS

- Beacon Users must ensure that their password is secure and kept secret from others
- Users should not access the Beacon system from a public computer such as a library or internet cafe
- Only view, access or otherwise process members personal, financial confidential information if it is necessary to carry out your role.
- Only disclose or provide access to others if it is necessary for their role.
- Limit what you need to view, access, process or disclose to the minimum required for the purpose.
- Redact, extract or mask information as appropriate.
- Only use members' personal, financial confidential information for its intended U3A purpose.
- If you have to send members' personal, financial confidential information by e-mail internally or externally, always password protect it - send the password by separate e-mail.
- Ensure the member's personal, financial information you are using is the most current and up-to-date version.
- Only store all members' confidential information on the u3a Beacon system, but limit what you store on your personal laptop, computer or drive - use password protection to maintain security
- Only keep members' confidential information for as long as you need it in your role. Delete outdated electronic files & shred paper copies
- If you become aware of any loss or inappropriate disclosure of members' confidential information, please inform the Business Secretary or Chair immediately.
- If you receive an enquiry or complaint relating to members' personal data or confidential information, contact the Business Secretary or Chair..
- Be aware of Up Holland u3a policies, procedures and rules to make sure your actions do not breach these. A copy of the Data Protection Policy is available from the Management Committee and on the website
- Ensure consent is obtained before taking or displaying photographs of u3a activities

UP HOLLAND & DISTRICT – MANAGEMENT COMMITTEE 2025/2026

POSITION	NAME	E-MAIL ADDRESS
VOTING MEMBERS		
CHAIR*	**Val Garner**	**chair@uphollandu3a.org**
VICE CHAIR*	**Neil Stevenson**	**vicechair@uphollandu3a.org**
TREASURER*	**Alan Hough**	**treasurer@uphollandu3a.org**
SECRETARY*	**Beth Turton**	**secretary@uphollandu3a.org**
ASST TREASURER	Pauline Occleshaw	assistanttreasurer@uphollandu3a.org
ASST SECRETARY	vacancy	
MEMBERSHIP SECRETARY	Stella Connor	membership@uphollandu3a.org
ASST MEMBERSHIP SECRETARY	Sue Jones	membership@uphollandu3a.org
BEACON ADMIN	Maz Logan	beaconadmin@uphollandu3a.org
GROUP COORDINATOR	Dorothy Walls	groupcoordinator@uphollandu3a.org
PUBLICITY COORDINATOR	Maz Logan & Barb Beesley	publicity@uphollandu3a.org
COMMITTEE MEMBER	vacancy	
USEFUL CONTACTS		
NEWSLETTER EDITOR	Margaret Millard	newsletter@uphollandu3a.org
CHURCH LIAISON & CAR PARK	Dave Cookson	churchliaison@uphollandu3a.org
VENUE COORDINATOR	Brenda Bibby	venuecoordinator@uphollandu3a.org
SPEAKER SECRETARY	Kathy Higgins	speakersecretary@uphollandu3a.org
WEB MANAGER	Kathy Higgins	webmanager@uphollandu3a.org

* ***OFFICERS***

VENUES

CURRENT VENUEs
Alexandra Park, Victoria St, Newtown, Wigan WN5 9BL
Bispham Methodist Church Scout Hall, & Church Hall, Crank Road, Billinge WN5 7DT
Garswood Hall Bowling and Community Club, Nicol Road, Ashton in Makerfield, Wigan WN4 8LU
Gathurst Golf Club, Miles Lane, Shevington
Porters Wood Golf Club, Gathurst Road, Orrell WN5 8EW
Robin Park Leisure Centre, Loire Drive, Newtown WN5 0UH
Shevington High School, Shevington lane, Wigan WN6 8AB
St Luke's Church Hall, Lodge Road Orrell WN5 7AT
St Matthew's, Billinge Road, Highfield
St Teresa's Club, College Road Up Holland WN8 0PY
St Thomas the Martyr Church, Church Street Up Holland, Skelmersdale WN8 0ND
The Dell, Up Holland WN8 0AJ
Up Holland Fishing Lakes, Chequer Lane, Up Holland
Up Holland Methodist Church, Alma Hill WN8 0PD
Wigan AMF Bowl, Leeds Street Wigan WN3 4BW
Winstanley Tennis Club, Hall Lane Billinge WN5 7XG
POSSIBLE VENUES FOR FUTURE USE
Appley Bridge Community Hall, Appley Lane, WN6 9AD
Gathurst Golf Club, Miles Lane, Shevington
Holland Hall, Lafford Lane, Up Holland
Studio 360 Gathurst Road, Orrell, Wigan WN5 0LH
St Francis Hall, Kitt Green
St Michael's Church Hall, Dalton WN8 7RP

UP HOLLAND & DISTRICT U3A: DELEGATED AUTHORISATION LEVELS 2025/2026

This document contains guidelines as to who is responsible for particular activities.

Order of Responsibility

		1	2	3	4	5
1	Bankline (BACS)	**T**	**S**	**AT**	**C**	
2	Cheque Signatories	**T**	**S**	**AT**	**C**	
3	Contract Signatories	**C**	**S**	**VC**	**T**	
4	Capital Expenditure Approval > £200	**MC**	**only**			
5	Capital Expenditure Approval < £200	**MC**	**C**	**VC**	**T**	
6	Expenses Payment	**T**	**AT**			
7	Grant Aid Applications Approval	**MC**	**only**			

[In exceptional circumstances the following maybe used { C+VC or C+S]

1	Key Holders - St Teresa's Club		**C**	**S**	**DH**	
2	Key Holders - St Teresa's Cupboard 1	Projectors	**C**	**KB**		
3	Key Holders - St Teresa's Cupboard 2	Audio	**C**	**KB**		
4	Key Holders - St Teresa's Cupboard 3	Cups	**MC**			
5	St Teresa Room Booking Issues	**MJ**				

Key:	
C	**Chair**
VC	**Vice Chair**
S	**Secretary**
T	**Treasurer**
AT	**Assistant Treasurer**
MC	**Management Committee**

KB	*Key Box*
DH	*Dilys Higgins [External]*
MJ	*Mary Jakulis stteresahalluphl@outlook.com*

Notes:

a Cheques & BACS require a minimum of two signatories

b Grant Aid applications should be approved by the Management Committee only

c Delegated Capital Expenditure & grant applications should be notified to the Management Committee

FINANCIAL GUIDELINES

The following advice for Group Treasurers should be noted -

1 An account must be opened with the u3a Treasurer to deposit funds and aid payment of rent.

2 It is the responsibility of the Group Treasurer to ensure that there are sufficient funds in their account for the u3a Treasurer to be able to pay their rents due in full.

3 Keep account records of all money taken in and all money spent by the group together with any relevant receipts.

4 Members should be encouraged to pay by cheques for trips and visits. Group Leaders should not hold large amounts of money.

5 All monies from the groups for trips etc. **must** be paid to the u3a Treasurer for banking.

6 Payments from the group's funds can be paid for by a u3a cheque obtained from the u3a Treasurer or by a BACS payment if requested. These payments should be recorded in the group's accounts and the receipts retained. Groups MUST have sufficient funds to cover the cheque/BACS payment requested.

7 Larger items involving capital expenditure require approval from the Management committee. Justification and estimates should be presented on the appropriate claim form. Once approved payment will be made from the u3a General Account either direct by the u3a Treasurer or by reimbursement made upon production of a valid receipt.

Note:

Any equipment purchased by this method, or group funds, remains the property of Up Holland & District u3a, not the groups.

8 Items such as tea, coffee etc. should be paid for from the door money taken by the Group Treasurer. Receipts should be obtained and kept.

9 Rents to be paid on time.

10 A "Start-Up" subsidy of up to £50 is available for new groups. This should be repaid to the u3a Treasurer when the group is financially viable.

11 A register of members attending each meeting should be recorded.

Information required by the u3a Treasurer from Group Leaders.

1 Opening balance from account records.

2 Final balance of money held plus copies of all receipts, accounts and attendance records for the year to be submitted to the u3a Treasurer no later than the end of the financial year, 31st March.