



Limebrook u3a Group Coordinators' Hand Book

February 2026

Contents:

Introduction and general organisation

Section 1: Information and Guidance for New and Established Interest Group Coordinators

1. *Getting Started*
2. *Interest Group Coordinators' Responsibilities*
3. *Medical Issues and Emergencies*
4. *Insurance*
5. *Data Protection*
6. *Financial Information*

Section 2: Communication with your group

7. *The Beacon and WhatsApp systems*

Section 3: Information which may apply to your group.

8. *Organising Visits for your group*
9. *Associate Membership*

10. *Conclusion*

Appendices

1. **Procedure for Prevention of, and Handling of, Accidents and Incidents**
2. **Insurance related to car sharing**
3. **Limebrook u3a Advice on Uncooperative group members**
4. **Limebrook u3a Trip Disclaimer**

Introduction The following information and guidance may be of use to the future running of your group and to run existing groups. NOTE: The roles outlined in this document can either be taken on by one member (Leader) or by several identified members (coordinators) within the group. If there is more than one coordinator for the group, eg a group coordination, arrangements can be made for those coordinators to gain access to use a Beacon group database, eg to send emails to the group members and to create registers, both attendance and ICE details. (ref Section 2 The Limebrook Beacon system)

General Organisation The Interest Groups' Organiser *GO* (Group Organiser) promotes interest in the formation of new groups via an Ideas Board starting in January of each year. Members are then encouraged to add their ideas/interests to the board and state if they are willing to co-ordinate a group. Then the *GO* will make sign-up sheets available at the following monthly meetings.

SECTION 1: Information and Guidance for New and Established Interest Group Coordinators

1. Getting Started a) Initial Meeting

- Informal 'Get to Know' each other.
- Once 6 members have signed the Group Organiser (*GO*) will organise an informal initial meeting to discuss how the group will work:
- What is the aim of the group?
- Agree who will take on specific roles:
 - Co-ordinator
 - Communications managers -WhatsApp, Beacon
 - Advertising your group- newsletter reporter, group notice board, website
 - Venue booking
 - Refreshment organiser
 - Events organiser/Risk assessment responsibility

Organise where to meet - venue, date, times, frequency for group meetings. Avoid clashes with other groups if possible. (A Limebrook u3a Monthly Programme of group meetings is displayed on the Interest Group Board at monthly meetings and in the newsletter - updated by *GO* as new groups are formed.

Risk Assessment Forms are available on the Limebrook u3a website, on the Groups Page, for completion either on your computer and sent as an attachment to the *GO* for filing, or print out a copy for the group and another for the *GO* (The *GO* or *GC* is required to save forms for 3 years)

Organising an event: Chat to the Treasurer for information about payment by BACs or Card Reader. Please note, the preferred method of payment is through the Treasurer. Cash payments are only acceptable if no other method is possible. Payment at monthly meetings or via BACs. Initially one member of the group can take responsibility for forming a WhatsApp group. **THEN** if the group decides to use the Beacon system, that member can easily create a register of membership's data, name, contact details, and In Case of Emergency (ICE) details. Keep a record

of who attends each meeting. If the group is full a waiting list can be initiated. Training can be given on how to use Beacon.(refer to Section 2: Communications)

2. Interest Group Coordinators' Responsibilities:

- Newsletter Reporter: Each month, usually a week before the monthly meetings, the Newsletter Editor will email the coordinator, or designated person responsible for reporting on the newsletter', to ask for a short-written report which he will include in the monthly newsletter. This report should give up-to-date news and any future arrangements which will be of interest to all Limebrook members. Report should be written in WORD (without formatting or fancy fonts. The report can then be sent back as an attachment in your reply email, to the Newsletter Editor. NOTE: Photos need to be sent as separate attachments.
- Interest Group Coordinators and Deputies: meet once or twice a year, one in the Spring, usually March and one in October or November. The purpose of these meetings is to get together to receive information from the Committee relevant to IGC's. Concerns can then be discussed, and decisions made on to any arising issues. We meet in the United Reform Church Hall, date and time agreed a month before next meeting. Refreshments are available.
- Monthly Meetings: This is the time when you can really advertise your group. It is important that a designated member of your group attends these meetings. A board can be provided for displaying the group's news.
- Refreshments at monthly meetings: Your group will be asked to 'man' the refreshments break approx. once a year. (A Rota is on the Committee and IGC's Board with this information). A committee member purchases and sets up everything before the meeting but will be pleased if 2 or 3 of your group help with this. You will need about 6 members to put out the milk, sugar, biscuits, serve the tea/coffee, collect empties, wash, and dry cups/saucers, and return to appropriate cupboard etc and make the kitchen clean and tidy.

3. Medical Issues and Emergencies (refer to Appendix 1 'Prodedure for Prevention of, and Handling of, Accidents and Incidents' for more detailed information)

- In an emergency, it is not expected that any of us will do anything other than take reasonable, safe, common-sense actions.
A member of the u3a holds a triannual First Aid session for those IGC (or named person) who feel they would benefit from her instruction. If you are planning a trip, the GO can provide you with a procedure should an accident or emergency incident occurs during an event or trip.
- Medical History - it is important that you have a quiet word with individual members about any medical history which you will need to know about eg diabetes. Members need to take responsibility for their own, and others' health if attending a visit or indeed attending regular group meetings.
- The Committee has issued these guidelines to all u3a members:
'If you have an ongoing health issue or feel unwell, it is important for you to let a group coordinator know in confidence. If you are not 100% fit on the day, please inform the coordinator, and discuss whether it is appropriate for you to participate. The group

coordinator has the duty of care to you and other members of the group and, we may consider it appropriate to exclude a member from the event.' This is an important point which needs to be considered before any outing. (refer to Appentix 4 'Trip Disclaimer')

4. Insurance

The Third Age Trust holds comprehensive insurance which provides cover for all U3A members against a wide variety of risks. The most important of these are:

- Public liability cover for U3A event organisers should they be found to be legally liable for the accidental injury or death of any person. Public liability insurance does **not** cover pure accidents where no legal liability has been established,
- Accidental loss or damage to property not belonging to you.
- Loss or theft of U3A cash in transit or held in a member's house.
- Loss, theft, or damage of U3A equipment.
- Damage to a member's house or property when being used for a U3A event.

Only members of the u3a are covered. It is the policy of the u3a that no guest/friend/family member are allowed to join u3a activities eg theatre trips, group meetings or events.

5. Data Protection The Limebrook u3a Data Protection Policy outlines the specific protocols for managing and safeguarding the personal information of its members.

It establishes a framework for **Legal compliance** with the General Data Protection Regulations (GDPR) to ensure that data collection is limited, accurate, and transparent.

U3a data is held in our Beacon system.

The document detailing **Security measures** for group coordinators are:

- Coordinators will have Beacon training when taking up the post.
- Coordinators must use a strong password on their Beacon list.
- Identified Coordinators **ONLY** are responsible and have access to the beacon data.
- Coordinators can use the data to generate group lists for ICE details and as attendance registers. These details are kept by the identified coordinator **ONLY**, unless, if unable to attend, these need to be handed to a delegated named member, e.g, Walking Group will have different leaders. Each leader will hold these registers for that walk only, History and Photography visits, where members may be split into two groups, 2 coordinators will hold the registers.
- ICE registers need to either be kept securely by the coordinator or should be shredded after the visit.
- Coordinators are legally obliged to ensure that such information is kept confidential.
- To clarify **individual rights** of group members, coordinators need to ask for consent from each member when either they, or another group member, takes photographs of the group.

- **Coordinators who do not use Beacon must ensure that their system is compliant in all respects with GDPR.**

Governance responsibilities are clearly defined. The Groups Organiser will provide Beacon training for those handling sensitive details.

Ultimately, this policy aims to foster a **secure environment** that protects the privacy of all participants within the Limebrook u3a.

6. Financial Information if applicable

All groups income and expenditure must go through the Limebrook u3a account. Keep a record of income and expenditure, as this information will be required by the Treasurer at the end of the financial year

If you are meeting in a venue which requires payment, or are organising a trip for your group, these are the payment options:

- **BACs** Contact the Treasurer about payment made through BACs. It is very straightforward.
- **Card reader** option is relatively new, Keith Parrot holds the main card holder, John Ord holds the second reader so talk to either about its use.

SECTION 2: Communication

Communicating with your group:

The Limebrook Beacon system

The Limebrook Beacon system is the data base which is run by the National Association and Limebrook subscribes to it. 'Limebrook Beacon' holds all the members' relevant information you will require about your group members. The Beacon Administrator will be able to add your group to the system and give you a log in which you can access details of each member of your group. Once added it is easy to establish your group record in the form of a list of members.

You can guarantee using Beacon is time saving, free and provides instant contact when necessary (via a Beacon email). Any group will benefit from this system but is especially useful with membership of 6 or more. Please contact the GO or the Beacon Administrator if you are interested, or if you have problems using it. Then contact the Beacon Administrator to set up your group and provide guidance in adding members to it. The Beacon system gives you far more administrative scope by providing data information and facilities to send group emails and create excel data sheets.

- Data provided is as follows - members' names, membership numbers, addresses, land line and mobile numbers, ICE (In Case of Emergencies) contacts and contact numbers and whether they are current members of Limebrook u3a.
- Easy contact with all members - by establishing a Beacon group you will be able to send personalized emails to the group (if they have internet access). The GO will be all too

happy to guide you in the setting up of the members list and show how you can print off the list - especially useful as a register of member attendance, or if out on a visit, the ICE numbers will be easily accessible. This can be your register of attendance and ICE contacts.

- Please refer to the **Limebrook u3a Data Protection Policy** section of this handbook (**Section 5 security measures**) for essential information on how to administer Beacon data safely.

WhatsApp groups

For smaller groups, communicating via WhatsApp has proved to be very efficient. So, as well as using Beacon for 'Admin' (eg group registers, Ice registers) WhatsApp is there for instant communication and discussion purposes.

SECTION 3 Information which may apply to your group.

7. Organising Visits for your group

- When a trip/visit has been agreed and booked, send out a Beacon email or WhatsApp to your members which should include date, meeting place and time, cost, car sharing (NOTE: not covered by u3a insurance), PLUS your mobile number. If possible, it is always better to visit the venue in advance. Otherwise, with information gained from the visiting the venue's website, include a short description of the visit, considering the risks to the members likely to attend, check ability of members eg climbing stairs, walking on slippery paths, facing obstacles like stiles, or walking without difficulty. Have a 1:1 with members about any medical condition. (see section on Medical Emergencies). You will need to complete a Day Visit Risk Assessment if you are planning a visit. You can state the starting point and finishing point of the visit, (eg a History visit in London, the start point can be a point outside the venue, and the finishing point at the exit from the venue. If, when completing a risk assessment form, the group is meeting at a given venue (eg a London venue; the place where a walk commences and ends etc) you can specify that this is where the risk assessment starts and finishes. How the members travel to that venue, is their responsibility and will not be covered by u3a insurance. This also applies to Car Share situations. Members can organise giving/requesting lifts privately.
- Again, this form is accessible on the Limebrook u3a website under Groups.
- **Always carry a mobile phone which is fully charged.**
- Using your Beacon register you can create 2 different sorts of registers
(a) an attendance register which could include other headings e.g. payment record, meeting place, car share etc.
(b) an ICE register of **all** members; this register should include members mobile phone details, **PLUS** ICE details of each member. You will need to take this register with you to **all sessions** and to any outings. You, as group coordinator, **ONLY** hold this register **UNLESS** your group splits into two smaller groups or in a large group situation.
- NOTE: The Chairperson needs to be sent a register of members attending with their ICE details, if the event is outside the Maldon district.

- A Risk Assessment will be required if your visit involves activities such as walking from coach to the venue.
- **A First Aid kit must be easily accessible on trips.** (ref Medical Emergencies)

NOTE: The National u3a has advice on responding to accidents/incidents and dealing with emergencies, including the insurance issue eg if car sharing has been organised by the coordinator. Please refer to Appendices A and D for detailed

8. Associate Membership

It is a requirement of our u3a that members, who belong to one of the other u3a's in our cluster group but attend a Limebrook u3a group, need to fill out **an Associate Members form** giving the same details as our Beacon system. There is no cost involved apart from where all members of the group may be required to pay - hire of a hall or outing expenses. There is also an understanding that if the group is full, Associate members keep their place and members from Limebrook will be added to a waiting list and given the next space. Associate membership forms can be accessed on the Limebrook u3a website on the Membership page.

Please note: If a member from another u3a requests to join your group but the group he/she belongs to already has a similar group, then the request should be turned down, except in exceptional circumstances.

10. Conclusion

National U3A

To support and enhance the running of a group there is a variety of information available from the National U3A organisation, including documents, interest group advisors, etc. Their website can be found here:

www.u3a.org.uk

We hope that you have found this Handbook both helpful and interesting. The committee would be pleased to receive any comments that you may wish to make; please send these to the GO.

On behalf of the committee, the GO would like to take this opportunity to thank you for all your hard work as an IGC on behalf of all members of Limebrook Maldon u3a.

Jo Madge

Interest Groups Organiser (GO)

Limebrook u3a Group Coordinators' Handbook Review Date: February 2026

Then every 2 years thereafter.

Appendices:

1. Procedure for Prevention of, and Handling of, Accidents and Incidents (refer to separate Appendix)

A. Introduction

The u3a has a responsibility, through its committee and Group Coordinators, for the well being of its members whilst they are involved in u3a activities.

If a u3a member is involved in an accident or incident whilst taking part in an event the "Person in Charge" (coordinator or person in charge of the group or the Host at the Monthly Meeting) must in the first instance tend to the safety and wellbeing of those involved (u3a members and members of the public). This includes calling Emergency Services if appropriate.

The Chairperson of the u3a, and the Groups' Organiser must be informed as soon as possible.

B. Insurance

The u3a maintains comprehensive Public Liability Insurance which covers members involved in u3a organised events. There are however some important exceptions, and these are shown below. The list is not exclusive.

- **You are not automatically insured when using your own car for a u3a activity, you will need to check this with your own car insurer.**
- **Members are not insured by the u3a when travelling in a member's car to a u3a activity. Members are advised to check with the car owner whether they have comprehensive insurance or not.**
- Accidents which occur whilst mounting or dismounting a vehicle would not normally be covered. However, on a coach, taxi etc, where one member is injured by the actions of another member in circumstances which have nothing to do with the vehicle, it may be covered by the u3a public liability insurance.
- **You are not insured if you are travelling independently, by whatever means, to an agreed meeting point.** Once at the meeting point, you are.

Members may offer lifts to other members without compromising their car insurance policy providing they do not make a charge. However, they may accept a donation towards petrol/diesel and parking costs. Guidance on donations is available in Limebrook u3a's document "Guidance on Car Sharing".

C. Risk Assessment (RA)

A simple Risk Assessment (RA) needs to be undertaken for all activities, particularly those involving u3a organised travel and entry onto unfamiliar sites. It is the responsibility of Group Coordinators to undertake these RAs. Generally, only one RA would be needed for each type of activity. (These are referred to as Generic Risk Assessments). **RAs must be conveyed to the members involved in the activity, and copy must be held by the Groups Organiser OR group coordinator and must be kept for 3 years.**

Risk Assessments (RA) demonstrate Limebrook u3a's commitment to and consideration of their members' wellbeing. In the event of a serious accident, demonstrate to an Insurance Company that Limebrook u3a has taken steps to reduce the chance of an accident.

Risk Assessment is not difficult and is mainly common sense.

Understand these two Definitions:

Hazard: *Something that has the ability to cause harm, injury or illness.*

Risk: *The likelihood of the hazard occurring and the severity of the harm if it does occur.*

To assist, there are Template Assessments available on the National u3a's website.

Where Interest Groups intend to meet outside of the Maldon area, the Group Coordinator must provide the Chairman with a list of those members attending PLUS ICE details.

Things to consider when doing a RA are: Access, Slips and Trips, Falls, Fire, Electricity, First Aid, Lighting, Weather, Traffic. This list is not definitive.

NOTE: Risk Assessments need to be updated EITHER after 3 years OR for new venues/visits eg walks, outdoor activities, change of home venues, any work being carried out in the home. If using commercial venues, you should be covered by their RA. Worth checking though

D. Accidents and Incidents

It is important that all accidents and incidents are fully reported and documented. This is particularly so where there is a likelihood of the insurance company becoming involved, immediately or in the future. This is the responsibility of the "Person in Charge" at the time. The documents required as a minimum are:

- Completed Limebrook u3a's Incident Report Form. If First Aid is given this must be detailed in the report. ***(Incident forms can be accessed from the Limebrook web site or paper copies from the GO)***
- Written statement from the injured/affected person(s)
- Written statement from all witnesses of the event
- Photographs of the incident, injuries and damage to property etc
- Risk Assessment for the event

The procedure for handling all accidents and incidents resulting from a Limebrook activity is the same wherever it takes place, and these are detailed in section D.1. The exception is any accident or incidents occurring in the West Maldon Community Hall, where additional reporting is required. These are detailed in Section D.2.

In all cases the person responsible for following the procedure is the "Person in Charge"; the Group Organiser, the Host at the Monthly Meeting, or anyone else in charge.

- D.1 If an accident occurs the Person in Charge must first attend to any person injured insuring that appropriate first aid is provided. If necessary, the Emergency Services must be called.

The Group Coordinator needs to implement the Immediate procedure when dealing with an accident:

- Check area is safe
- Assess injured person
- If medical assistance is required designate members to:
 1. phone emergency services
 2. if in a remote place the 3 words app can be utilized by a member
 3. nominate a responsible group member to assistance in administering first aid to the injured person
 4. record statements and from those who witnessed the accident
 5. take photos of the location of the accident

If doing any outdoor activity, a standardised First Aid kit must be carried by the GC. Limebrook u3a has several kits for groups to borrow.

Items in the First Aid kit are: Triangular bandage, cotton bandage, crepe bandage, safety pins, emergency blanket, sling, blunt scissors, micropore dressings, sterile water in small container.

Once the situation has stabilised, the Person in Charge must inform the Group Organiser of the incident. The completed Incident Report Form, written statements and supporting documents and photographs must be forwarded to the Group Organiser without delay.

The Group Organiser immediately advises the Chairman of the accident and forwards copies of the Incident Report Form and all associated documents.

The Chairman will contact any injured persons to establish whether any appropriate help is required. Depending on the circumstances of the accident, advises the Insurance Company of a possible claim.

- D.2 Accidents which occur in the West Maldon Community Association Hall or on its grounds require additional reporting. The "Person in Charge" must record in the Associations Accident Book, which is located in the Foyer, sending a copy directly to the u3a Chairman.
- D.2.1 Where an Interest Group is involved, the "Person in Charge" is the Group Coordinator, and the procedure of management and reporting as shown in para D.1.
- D.3 The Chairman will pass details to the Secretary who will arrange for the accident to be included on the Agenda of the next following u3a Committee Meeting. The committee will review the documents with the intent of determining the cause. All documents, including photographs and relevant committee minutes will be stored electronically for a minimum of three years

2.Car Sharing. (refer to Appendix 1 for more details)

*The question of accidents in motor vehicles is complex. Any accident arising from the driving of the vehicle would fall **outside** the scope of public liability insurance because motor insurance is an entirely separate matter, and such incidents are covered under a motor insurance policy. This would normally include accidents which occur whilst mounting or dismounting a vehicle.*

3.Limebrook u3a Advice on Uncooperative group members:

A member may be asked to leave an interest group when, even after a warning has been given

1. That person's regular and unexplained absence is preventing another member on the waiting list from joining the group.
2. That person's conduct is having an adverse and detrimental effect, not only on the efficient running of the group, but also on other group members.

4.Limebrook u3a Trip Disclaimer form:

Suggestion -This could be sent out via Beacon, by the co-ordinator, with the itinerary before the trip/activity. The members then should response.

By participating in this trip/activity to,

I confirm that:

1. I have read and understood the travel arrangements/itinerary, including and health and safety advice
2. I am taking part in this trip/activity both voluntarily and at my own risk.
3. I know of no reason why I should not take part in this trip/activity (e.g. ill health)

