

## Group Convenors Handbook for u3a Todmorden

November 2024

### CONTENTS

#### PART ONE.

Overview of How to run a Special Interest Group with guidelines from Third Age Trust and supplemented by advice from the Committee at u3a Todmorden.

2 to 8.

#### PART TWO. Related u3a Todmorden documentation

Finance.	9 &10
Risk Assessments.	11
Venues and Accessibility in the u3a Todmorden locality	12 to 14.
Beacon Administrative system;	15 to 21
Using the Website to advertise your group and its calendar.	22 to 26
Members of other u3as.	27
Insurance	28
Data protection	29
Publicity and Communications	30
Equipment available for Special Interest Groups	31

#### PART THREE Forms and templates

Accident Form	32 & 33
Risk Assessment template for Venue.	34 & 35
Risk Assessment template for Workshop Activity.	36 & 37
Risk Assessment template for Sporting Activity.	38 & 39

## Introduction

It is acknowledged that Special Interest Groups are the lifeblood of u3a Todmorden. Creating more groups gives members more choice and widens their opportunities for learning.

Indeed, new members often join their local u3a because of the learning they can share. We want to give as much help and guidance to members who are curious about starting a new Interest Group and taking on the Convenor or Assistant Convenor's role. Hence this handbook.

The information brings together material from national guideline documents and some of our own procedures and practices at u3a Todmorden.

There are some requirements which must be observed e.g., the need to ensure that all attending your group are u3a members, and the need to report accidents. Similarly, the need to keep up to date on the u3a Todmorden website, the information seen by the public who are curious to know what u3a Todmorden has to offer them. Not to mention new or existing members who may be interested in joining your Interest Group. This is not as daunting as it first sounds as Beacon will share the information with the website. The only requirement is to familiarise yourself with using the Beacon administrative system, instructions for which are included in this handbook.

U3a Todmorden Committee is delighted you are considering taking the plunge and starting a new group for our members. Research has shown that a successful 'buzzing' u3a has many groups open to all members. Please don't hesitate to contact the Group's Coordinator in the first instance if you have any questions or require further help.

However, it is important that your group follows the U3A ethos of shared, participative, and self-help learning. 'The teachers learn, and the learners teach.' The result then will be not only an increase in knowledge, but a supportive and friendly atmosphere which enables everyone to participate.

## U3A principles

The U3A ethos is based on three principles:

### The Third Age Principle:

- Membership of a U3A is open to all in their third age.
- Members promote the values of lifelong learning and the positive attributes of belonging to a U3A.

- Members should do all they can to ensure that people wanting to join a U3A can do so.

### **The Self-Help Learning principle:**

- Members form interest groups covering as wide a range of topics and activities as they desire.
- Learning is by the members, for the members.
- No qualifications are sought or offered. Learning is for its own sake, with enjoyment being the prime motive, not qualifications or awards.
- There is no distinction between the learners and the teachers. They are all U3A members.

### **The Mutual Aid principle:**

- Each U3A is a mutual aid organisation, operationally independent but a member of the Third Age Trust, which requires adherence to the U3A movement.
- No payments are made to members for services to any U3A.
- Each U3A is self-funded with membership subscriptions kept as low as possible.
- Outside financial assistance should only be sought if it does not imperil the integrity of the U3A.

## **The first steps to forming a new group**

Recommended steps to undertake:

- Agree an outline of your group with the Group Coordinator/U3A Committee.
- How will payments for the group be organised. See page 9 & 10 for information on Finances at u3a Todmorden.
- Consider what interest there might be in the subject perhaps by some informal soundings.
- Consider what the aims of the group are – what are you hoping to learn/achieve/share by offering the group?
- Consider contacting neighbouring u3as to see if they have a similar subject group and then talk to the group leader to get some first-hand knowledge. It may be that you could sit in on a group meeting.
- Generate interest by promoting your group using as many different methods as possible. This could include developing publicity in the form of a flyer, poster, promotion via existing groups, via the u3a newsletter, talking to members in groups that you attend. The more methods you use, the more successful you are likely to be.

- You should consider whether there are any risks that might occur because of the group's activities. See page 11 for u3a Todmorden's recommendations for completing a Risk Assessment.
- Identify what you want to achieve from your first meeting.
- Organise an initial meeting and invite people to attend.

## The first meeting

Recommended steps to take at the first meeting:

- Introduce yourself and the purpose of the group as you see it.
- Ask about the skills within the group.
- Agree the tasks that need doing to run the group and who is willing to support these – who is willing to help with the programme or keep the register. See below for more ways in which you could ask for help.
- Agree, if relevant, the level that the group will be aimed at – beginners, improvers, advanced.
- Agree how the group will work – discussion, instruction, presentation etc.
- Agree when and where the group will run.
- Identify any accessibility needs that group members may have. See pages 12 & 13 for a list of some of the venues in the area used by U3aTodmorden which includes a summary of facilities available.
- Agree the costs for running the group and what members will pay.
- Discuss how group members will communicate with each other bearing in mind data protection concerns. U3a Todmorden groups use the email facility on Beacon. See pages 15 to 23 for help in using the Beacon Administrative system. If using private emails, please remember to use BCC to make sure everyone's contact details remain private. Our groups often use WhatsApp groups for easy messaging within the group. Also, on page 26 there is a summary of u3a Todmorden's Data protection policy and what it means for convenors.
- Ensure that all group members are current members of U3A Todmorden and advise any who are not that they will be required to join. See page 24 for information on how to include people who are members of another u3a and would like to attend your meeting.
- Agree some ground rules e.g.
  - Be punctual
  - Listen to each other
  - Allow others to speak
  - Let someone know if you are unable to come
  - Agree to disagree amicably and be respectful to other group members
  - Every contribution matters

- Have patience with and encourage those who are slower to learn

Feedback what was agreed at the first meeting to your Group Coordinator for the next steps.

Some points to bear in mind:

[Sharing the load of convening a group.](#)

Let's remember that the ethos of learning with u3a is to learn together. The Convenor is not the group's teacher, and everyone should be encouraged to contribute suggestions. Here are some ways in which you could help the smooth running of the group

1. Finding a suitable venue and booking the room.
2. Collecting monies to pay for the room.
3. Arriving at the meeting early enough to set out tables & chairs as well as putting away again.
4. Rotating the writing of the monthly Group report and sending to Groups Coordinator for posting on the website.
5. Updating the Diary / Calendar / Schedule on Beacon.
6. Informing the group of arrangements for the next meeting.
7. Setting up a chat group on WhatsApp.
8. Managing a refreshment rota & bringing the milk.

## Participative learning and learning styles

***'Tell me and I forget. Teach me and I remember. Involve me and I learn.'*** Benjamin Franklin

***'Every accomplishment starts with the decision to try'.*** Anon

The value of the U3A style of learning is that everyone can contribute and by doing so will gain a feeling of self-worth and integration. We all learn in different ways. Variation in content, method and style can make the learning experience more vibrant and appealing. Many of us will have particular skills but most of us will use a combination of the following: –

**Visual:** using pictures, diagrams, images and spatial understanding.

**Verbal:** using words – both spoken and written.

**Auditory:** using sounds, rhythm, music, spoken presentations.

**Physical/kinaesthetic:** using hands, body, senses and acting things out.

**Logical/Mathematical:** using logic, systems, sequences, data, statistics.

**Social:** learning as part of a group, sharing experiences and explaining your understanding to others.

**Solitary:** studying on your own.

Consider the following options:

**A visiting speaker:** A one-off visiting paid speaker, non-paid tutor or someone from another interest group or U3A.

**Group member presentations:** A short presentation by a member of the group or a member leading the meeting on a specific topic.

**Discussion groups:** Some activities will lead to discussion e.g. 'What the papers say', 'Which way does water go down the plug hole – and why?'

**Project based:** A project chosen by the members. Each person (or pair) allocated an area of research which they bring to the group. This can be a good way to learn new technology.

**Practical work:** This might lean towards specific subjects such as science, craft, photography, creative writing, story-telling.

**Drama:** Create a short sketch. Provide some entertainment for your monthly meeting.

**Themes:** Have an event or presentation linked to a specific topic.

**Liaise with a school or community group:** E.g. local history presentation, art exhibition, debate.

**Liaise with other organisations:** Museums, universities, libraries. Very useful for Shared Learning Projects.

**Shared Learning Projects:** These are opportunities to work on short term projects with other U3As or outside organisations. They usually involve research and have a definite outcome. **Contact the Groups Coordinator at u3a Todmorden** for more information if you might be interested.

**Study days and workshops:** Plan one for your own members or as part of a local network. E.g. Family History Day, Language day, Story-telling workshop, debate, quiz, music.

**Online learning:** MOOCS (Massive Open Online Courses), YouTube 'How to' videos, Future Learn.

## Help and support

### Resources

**Subject Advisers:** Trust volunteers with specialist knowledge in a wide range of topics. Contact details on the [National Website](#) and in Third Age Matters.

**External organisations:** Museums, libraries, schools, universities.

**U3A publications:** Check the national website for the latest publications.

**Networks, regions, neighbouring U3As:** allow you to draw on experience from within the movement.

**Regional Trustee:** will provide an overview of the region and a link to National Office.

**National Office:** The staff team are available Monday to Friday to offer support.

### Other learning opportunities

- Shared Learning Projects and Shared Learning Project Coordinators – contact details available from the national website
- National and Regional Summer Schools
- Events facilitated by National Office
- National, Regional and Network Workshops and study days
- Outreach departments of universities

## Sharing information

It can be good to share information about your group which can be done in a number of ways:

- On the U3A website
- U3a Todmorden website.
- U3a Todmorden has a Facebook account.
- Via social media
- In the U3A newsletter
- Via Sources or Sources Online
- At regional, network or local events

## Policies and procedures

U3A Todmorden Insurance arrangements are explained in this handbook. See page 25

It is recommended that you also have a look at the advice section of the National Office website where a range of useful information can be found. It is also a good idea to sign up to the newsletter that is sent out by the Trust every month as this will keep you up to date with wider U3A news. You can sign up to the newsletter via the national website

## Problem solving

Sometimes issues can arise within a group that disrupt the smooth running and spoil the enjoyment for everyone. Don't leave a problem too long before trying to resolve it. Talk to your Group Coordinator or Committee if you are unsure how to resolve the problem or just want someone to explore options with.

## Issues between group members

Where there is potential for friction it is advisable to begin by bringing it into the open. Either you or another person could try to facilitate a discussion either with the members concerned or with the whole group, but it is important that the facilitator remains neutral and non-judgemental. If you cannot reach a resolution informally speak to your Group Coordinator [groups@u3atod.org.uk](mailto:groups@u3atod.org.uk) or a member of the committee. If a situation does not resolve and becomes acrimonious your committee can consult the advice on disciplinary procedure provided by the Trust. There are also Trust Volunteers trained to support with resolving disputes.



## Accidents and incidents

Report all accidents and incidents to your committee as soon as possible and complete an accident form. See page 29 & 30 in this handbook. It is as well to have an accurate record in case of future problems relating to the incident. Remember that the Third Age Trust provides insurance for group activities. For some groups you may consider it necessary to ask members to hold or provide emergency contact details. Please note that the reverse of the u3a Tod membership card has space for you to write your own emergency contact details should you become ill whilst attending a u3a Todmorden activity or event.

## Beacon Administrative system

This section of the handbook is for you to communicate safely with the committee, your group members, and the public via the u3a Todmorden website. It makes sure you remain within the laws of GDPR. It includes:

- Statement of the group's aims and objectives
- Contacts
- Registers
- Venue, timing, costs
- Accounts

**For further U3a Todmorden Help & Advice please contact the following**

[accessibility@u3atod.org.uk](mailto:accessibility@u3atod.org.uk)

[almoner@u3atod.org.uk](mailto:almoner@u3atod.org.uk)

[beacon@u3atod.org.uk](mailto:beacon@u3atod.org.uk)

[committee@u3atod.org.uk](mailto:committee@u3atod.org.uk)

[web@u3atod.org.uk](mailto:web@u3atod.org.uk)

[groups@u3atod.org.uk](mailto:groups@u3atod.org.uk)

[membership@u3atod.org.uk](mailto:membership@u3atod.org.uk)

[treasurer@u3atod.org.uk](mailto:treasurer@u3atod.org.uk)



## PART TWO

### u3a Todmorden documentation

#### Finance

All money collected or spent by individual groups is “u3a Money”. As a rule, all monies collected must be paid over to the Treasurer and all payments must be made by the Treasurer. There is no requirement for groups to make any contribution to central funds and all funds handed over to the Treasurer are held for that group’s use. The Treasurer keeps a record on the Beacon system of monies received and paid out for each group.

It is recognised that groups will make some small payments from time to time (e.g., buying some materials or tea and coffee) and it is accepted that some limited funds may be held for this purpose. In general, individual convenors should not hold more than £25 for any length of time. Receipts must be retained with the group records for any payments made direct.

The Convenor (or another specified group member) is responsible for the monies collected and paid out, whether to the Treasurer or direct. It is very important to keep a record of all group income and expenditure, and to make this available to the Treasurer on request. The Committee would prefer convenors to do this on the Beacon system – the Group Record for each group includes a simple Ledger facility where transactions can be entered, and balances monitored. If this is not practical, then a cashbook or spreadsheet can be used.

To comply with charity accounting regulations financial records must be held for 6 years – if the group is no longer active the records can be handed over to the Treasurer by the last convenor.

Each group decides what to charge its members (if anything), depending on its circumstances and in particular its meeting room costs. It is important to make clear to group members what the charges will be and what they cover, to avoid uncertainty and disputes. All the group’s activities must be entirely funded from within the group membership. There can be some limited exceptions e.g., there has been a contribution from central funds to the costs of a public exhibition by the photography group. If you are undertaking such an event or possibly purchasing some equipment which may be of use to others, you can apply to the committee for a contribution. It must be approved in advance by the committee.

New groups can apply for a contribution of up to £100 to assist in starting up, specifying how the money is to be spent. This must be approved by the committee in advance.

If a meeting is held in a private house, it is considered reasonable for the members to pay a contribution to tea/coffee and for any extra heating costs that might be applicable. When a group books a meeting venue there may be a hire charge to pay depending on the policy of the venue – for example the Fielden Centre and Central Methodists always charge for rooms.

Payments for room hire (and any other costs) are made direct by the U3A Treasurer – so when arranging facilities, the premises manager/administrator should be told to send invoices to the Treasurer, preferably by email ([treasurer@u3atod.org.uk](mailto:treasurer@u3atod.org.uk)) or by post to the letterbox at the Fielden Centre. Some venues may agree to send copies of invoices to the group convenor. The Treasurer will check with convenors to ensure the invoices are correct. Convenors should ensure that funds held centrally are always sufficient to pay monies due.

The Convenor may hand over cash and/or cheques (made out to u3a Todmorden) from members to the u3a Treasurer at a monthly Members' Meeting or elsewhere by arrangement. If this is not practical then cheques – not cash – can be left in or posted to the u3a letterbox at the Fielden Centre, or payment can be made by bank transfer to the Tod u3a bank account – contact the Treasurer for details.

While it is National u3a policy that money should not go through the bank account of a private individual, the Committee accepts that it is safer for convenors to retain cash and pay by personal cheque or bank transfer when cash cannot be handed over in person or large sums are involved. It is important to record this movement of money in the group's records. See pages 15 to 19 with guidance in using the Ledger on the Beacon administrative system

The Treasurer will be happy to answer queries from convenors about financial matters; stop by and chat at a monthly meeting, or email [treasurer@u3atod.org.uk](mailto:treasurer@u3atod.org.uk).

## **u3a Todmorden documentation**

### **Risk Assessments.**

National U3A guidance on Risk Assessments is that they strongly advise group coordinators to carry out Risk Assessments/Checklists prior to commencing a group – members are entitled to assume that a u3a activity they are invited to take part in is safe for them to do so.

We are strongly advised to have considered all the risks of the activity should we need to make a claim on our Insurance policy. Whilst the Insurance policy would not be invalidated by the lack of completing a Risk Assessment, the success of the outcome is likely to be reduced.

The best way to ensure this is to undertake a Risk Assessment/Checklist which will allow you to identify and deal with any obvious danger as well as recording the process you have been through. Risk Assessments/Checklists will vary in complexity depending on the activity being assessed.

It is the responsibility of the group convenor to complete the appropriate risk assessment. For templates for u3a approved checklists and Risk Assessments, please see pages 31 to 36. Once completed, please send a copy to the Group's Coordinator.

## U3a Todmorden Documentation

### Venues in the u3a Todmorden locality.

U3a Todmorden has a list of venues showing the facilities available to enable members with different needs to be accommodated. Should a member not be able to participate independently in U3A activities a Carer/Companion is essential to comply with U3A Insurance Policy Requirements. There will be no extra charge for the Carer; the Carer may be another U3A member who is a friend, in which case both are covered by U3A Insurance. The carer would need to join u3a Todmorden so that they can be included in the register of those in attendance.

Group Convenors running groups that require a certain level of fitness and/or mobility will be asked to provide this information to members in advance so that members can decide as to whether the group is suitable for them.

On the next page is a table showing an overview of facilities at popular venues in the Todmorden area for u3a interest group activities.

Please note that Honest John's\*\* in Todmorden has a supplement on the following page showing particular details and comments for wheelchair users

## POPULAR VENUES FOR U3A TODMORDEN GROUP ACTIVITIES

(updated 2024)

VENUE + capacity, incl. chairs & tables	FLOOR	LIFT STAIRS	ENTRANCE STEPS	RAMP	WHEELCHAIR SPACE	DISABLED TOILET	HEARING LOOP	NOISY QUIET	WiFi	OTHER
Central Methodist Church (20)	Ground	Both	Yes	Yes	Yes	Yes	Yes	Quiet	No	Book with <a href="mailto:jplee7@talktalk.net">jplee7@talktalk.net</a> Pay quarterly via Treasurer
Fielden Centre Main Hall (30)	Ground	N/A	No	No	Yes	Yes	No	Quiet	Yes	Kitchen area. Car Park. Book with Denis, tel: 07533106654 Pay monthly via Treasurer
Fielden Centre Upstairs Room (12)	1st Floor	Stair Rail	No	No	No	Yes	No	Quiet	Yes	Projector screen. Book with Denis, tel: 07533106654. Pay monthly via Treasurer
Fire Station Community Room (12)	Ground	none	Door frame only	No	Yes	Yes	No	Quiet	No	No cost. Kettle. Book monthly with <a href="mailto:Lisa.Candlin@westyorksfire.gov.uk">Lisa.Candlin@westyorksfire.gov.uk</a>
Golden Lion, main bar area (12-16)	Ground	No	3	Yes	Yes	Yes	No	Noisy. Cold?	Yes	Book with bar staff. Members purchase drink in lieu of fee.
Golden Lion, small bar	Ground	No	3	Yes	Yes	Yes difficult	No	Quieter than main bar	Yes	Book with bar staff. Members purchase drink in lieu of fee.
Hebden Bridge Town Hall. Saltonstall Room(8)	First	Step and lift	No	No	Yes	Yes	No	Quiet	Yes	Book with HB TH. White board. Price reduction for block booking. Pay monthly via Treasurer
Honest John**(10)	Ground	N/A	3	No	Limited	Yes but difficult	No	Quiet	Yes	Book with bar staff. Members purchase drink in lieu of fee.
Roomfield Baptist Church (50)	Ground	None	No	No	Yes	Yes	Yes	Quiet	Yes	Booking Secretary at RBC. Pay monthly via Treasurer
Todmorden College Hawkstone (20) Pex Tenement (40) Stoodley (50)	1 <sup>st</sup> , 2 <sup>nd</sup> Floors	Both	Yes	Yes	Yes	Yes	No	Quiet	Yes	White board. Drop down screen. Projector. Small car park. Book with <a href="mailto:kyle@tichub.org.uk">kyle@tichub.org.uk</a> Pay monthly via Treasurer.
Hare and Hounds, Todmorden (16)	Ground	No	No	No	Yes	No	No	Room adj to bar. Speakers can be disabled	Yes	Car park. Bus route. Free. Purchase drinks. Landlady: Jo <a href="mailto:hareandhoundsintodmorden@gmail.com">hareandhoundsintodmorden@gmail.com</a>
Todmorden Golf Club	Ground	No	Yes	Portable	Possible	Yes	No	Quiet	Yes	Car park. . Book with TGC.
Todmorden Sports & Leisure Centre	1 <sup>st</sup> Floor	Yes	No	Yes	Yes	yes	No	Excited players!	Yes	Car park. Can play outside. Book with TSLC. Pay monthly via Treasurer.
White Hart Todmorden (12-16)	1st Floor & Ground	No lift	none at side door	No	Yes	No	No	More Noise Ground floor	Yes	Book with bar staff. Members purchase drink in lieu of fee.



## SUPPLEMENT TO HONEST JOHN'S RISK ASSESSMENT DISABILITY

Disability	Y/N	Details	Comments
Wheelchair Access	Yes	Available through outdoor section to the left of the building.	Considered unsuitable for some users. See notes.
Zimmer frame access	Yes	As above unless the individual was able to negotiate the three steps into the building	Assistance would be required to open The doors
Hearing Induction Loop	No	It is a small room so, dependent on the extent of deafness, visitors should still be able to participate in proceedings.	
Guide Dogs	Yes	Dog friendly establishment per Trip Advisor	
Computer aided speech	Yes	Free wifi	
Cater for allergies	N/K		Menu caters for Vegans/Vegetarians but allergies not checked
Toilet Facilities	Yes	Two unisex toilets	unsuitable for wheelchair users as doorways not wide enough for wheelchair access
Clear Fire Exit Signage	Yes	Two forms of exit from room. One through entrance door the other via door into staff side of bar area	But see Notes

### Notes

If it is impossible to predict the number of attendees in advance, room can only accommodate a maximum of sixteen ambulant members.

This is a small private room containing three tables, two x three-seater settees, six armchairs and four hard back chairs. Seating can be moved but tables cannot so limited access for wheelchair.

Access to room is via heavy fire door and, if coming through the bar, there is also a set of double doors to negotiate. It appears, on a visual check, that the doorway to the private room is too narrow. Same applies to the bar door.



## U3a Todmorden Documentation

### Beacon Administrative system.

If you aren't already a Beacon user, please request a username and password by sending an e-mail to [beacon@u3atod.org.uk](mailto:beacon@u3atod.org.uk)

### What we use Beacon For

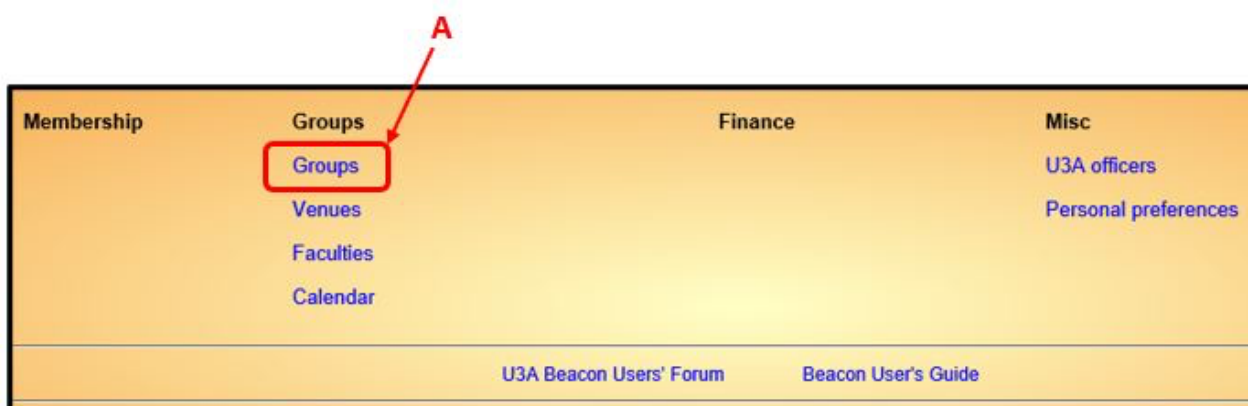
Convenors use Beacon for contacting group members by email, and for recording money spent and received in a ledger. It has additional features for managing group information and a calendar of group activities, but Todmorden u3a has chosen to use the Web site for these functions, since the Beacon Members' Portal requires members to log in, and we want them to be able to access group information and the calendar without such a barrier to access.

### How to access Beacon

Beacon is accessed on the Internet using the URL <https://u3abeacon.org.uk> with the username and password given to you by the Beacon Administrator.

*Note: The things that you can view and the operations that you can perform may differ from those described below, according to the System Access and Privileges allocated to your Role by your U3A Committee.*

As a Group Leader your Home Page will look similar to that shown below, depending on the extent of system access given to you.

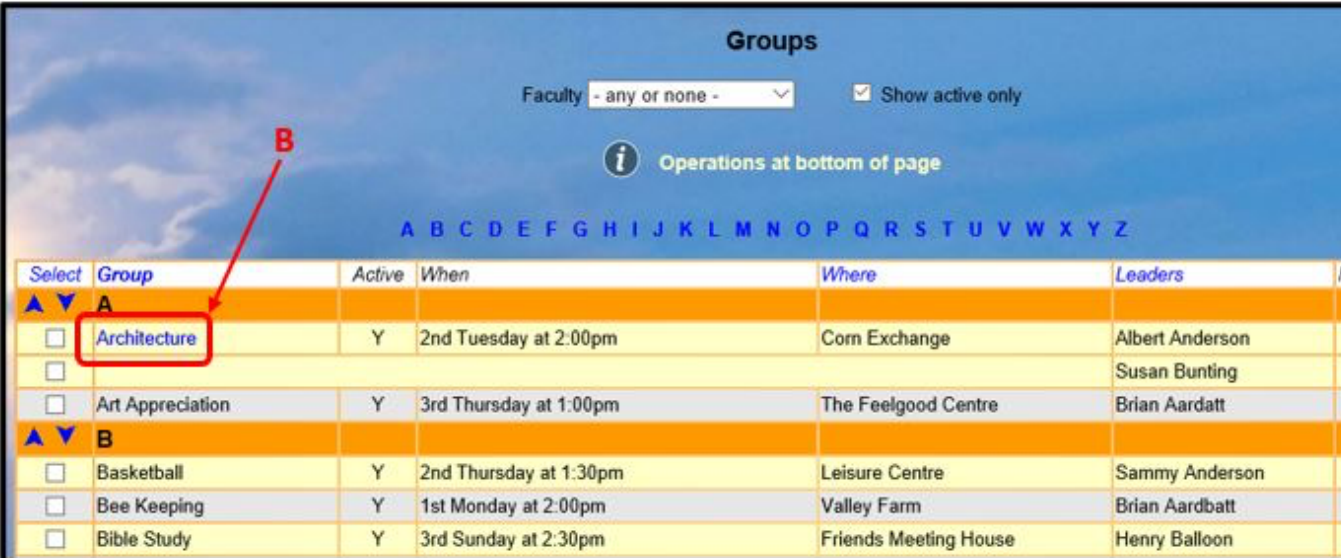




## Viewing your Group Record on Beacon

To view the **Group Record** for your Group, click on the Group name in the Groups List ([see 5.1](#)), or elsewhere where Group names are shown. Groups for which you are a Leader or for which you have editing rights are highlighted blue.

Groups for which you are a Leader are highlighted blue. Click your Group **[B]** to go to your **Group Details** page.



The screenshot shows the 'Groups' page on Beacon. At the top, there's a 'Faculty' dropdown set to '- any or none -' and a 'Show active only' checkbox which is checked. Below this is an information icon and the text 'Operations at bottom of page'. A navigation bar with letters A-Z is visible. The main table has columns: 'Select', 'Group', 'Active', 'When', 'Where', and 'Leaders'. The table is divided into sections 'A' and 'B'. In section 'A', the 'Architecture' group is highlighted in blue and has a red box around its name, with a red arrow labeled 'B' pointing to it. Other groups in section 'A' include 'Art Appreciation'. Section 'B' includes 'Basketball', 'Bee Keeping', and 'Bible Study'.

Select	Group	Active	When	Where	Leaders
▲ ▼	<b>A</b>				
<input type="checkbox"/>	Architecture	Y	2nd Tuesday at 2:00pm	Corn Exchange	Albert Anderson Susan Bunting
<input type="checkbox"/>	Art Appreciation	Y	3rd Thursday at 1:00pm	The Feelgood Centre	Brian Aardatt
▲ ▼	<b>B</b>				
<input type="checkbox"/>	Basketball	Y	2nd Thursday at 1:30pm	Leisure Centre	Sammy Anderson
<input type="checkbox"/>	Bee Keeping	Y	1st Monday at 2:00pm	Valley Farm	Brian Aardatt
<input type="checkbox"/>	Bible Study	Y	3rd Sunday at 2:30pm	Friends Meeting House	Henry Balloon

Each Group Record comprises four sub-pages, of which we are interested in the last two.

You can select between these on the row beneath the Group Record title. The active sub-page has its #name in black.

Details	Schedule	Members	Ledger
---------	----------	---------	--------

## Viewing your Group Ledger

Click **Ledger [C]** to go to your Group Ledger page.



**Group Record for Wine Tasting**

Details   Schedule   Members   **Ledger**

**Group Details**

Group: Wine Tasting

Faculty:  Status: Active Max members: 10

☐ Allow members to join on-line ☐ Enable waiting list ☐ Notify leader of changes

When: 4th Wednesday

Normal start time: 19:00 End time: 21:00 Contact: Joyce Rutherford

All transactions are shown for the Group between the selected **From** and **To** dates (which default to the current financial year), together with the incremental current balance.

**Group Record for Wine Tasting**

Details   Schedule   Members   **Ledger**

**Group Ledger**

From: 1/4/2018 to: 31/3/2019

Date	Payee	Detail	In	Out	Balance	
		Brought forward			£ 0.00	
2 Jan 2019	Tesco	Wine purchase		£ 90.00	£ -90.00	<a href="#">edit - delete</a>
3 Jan 2019	Members	12 x £10	£ 120.00		£ 30.00	<a href="#">edit - delete</a>
3 Jan 2019	Leisure centre	Room hire		£ 20.00	£ 10.00	<a href="#">edit - delete</a>
3 Mar 2019	Tesco	Wine purchase		£ 85.00	£ -75.00	<a href="#">edit - delete</a>
6 Mar 2019	Members	11 x £10	£ 110.00		£ 35.00	<a href="#">edit - delete</a>
6 Mar 2019	Leisure centre	Room hire		£ 20.00	£ 15.00	<a href="#">edit - delete</a>
Date	Payee	Detail	In	Out	Balance	

[Download Excel](#)

**Add transaction**

Date	Payee	Detail	In	Out
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

[Save](#)

Transactions can be **edited** or **deleted** by clicking the blue links on the right of the page.

An Excel copy of the ledger can be downloaded by pressing the **Download Excel** button.

## Editing your Group Ledger

The Group **Ledger** page can be used as a basic facility to account for monies paid out and received, for your group. There is no connection between this ledger and the

main Treasurer's ledger, however, the Treasurer is able to see an overview of your ledger and add the income and expenditure to the main ledger.

All transactions are shown for the Group between the selected **From** and **To** dates (which default to the current financial year), together with the incremental current balance.



**Group Record for Wine Tasting**

Details    Schedule    Members    Ledger

**Group Ledger**

From  to

Date	Payee	Detail	In	Out	Balance	
		Brought forward			£ 0.00	
2 Jan 2019	Tesco	Wine purchase		£ 90.00	£ -90.00	<a href="#">edit - delete</a>
3 Jan 2019	Members	12 x £10	£ 120.00		£ 30.00	<a href="#">edit - delete</a>
3 Jan 2019	Leisure centre	Room hire		£ 20.00	£ 10.00	<a href="#">edit - delete</a>
3 Mar 2019	Tesco	Wine purchase		£ 85.00	£ -75.00	<a href="#">edit - delete</a>
6 Mar 2019	Members	11 x £10	£ 110.00		£ 35.00	<a href="#">edit - delete</a>
6 Mar 2019	Leisure centre	Room hire		£ 20.00	£ 15.00	<a href="#">edit - delete</a>
Date	Payee	Detail	In	Out	Balance	

[Download Excel](#)

**Add transaction**

Date	Payee	Detail	In	Out
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

[Save](#)

Transactions can be edited or deleted by clicking the blue links on the right of the page.

An Excel copy of the ledger can be downloaded by pressing the **Download Excel** button (according to your access privileges).

### [Adding to your Group Ledger](#)

To add a new **Transaction** to the Group Ledger - fill in the Date, Payee, Detail (the reason for the transaction) and the amount **In** or **Out** before pressing the **Save** button.

[Download Excel](#)

**Add transaction**

Date	Payee	Detail	In	Out
08/03/2019	The Wine Shop	Wine purchase		99.00

[Save](#)

Note: On the Group Ledgers, **Payee** can refer to both a person to whom money is paid and a person paying money to you.

Group Ledger					
		From	1/4/2020	to	31/3/2021
Date	Payee	Detail	In	Out	Balance
		Brought forward			£135.00
2 Apr 2020	Tesco	Wine purchase		£76.00	£59.00
7 Apr 2020	Members	8 x £10	£80.00		£139.00
8 Apr 2020	Leisure Centre	Room Hire		£50.00	£89.00
6 May 2020	The Wine Shop	Wine purchase		£85.00	£4.00

## Using Beacon for communication with members (simplified version)

### Beacon Instructions for Convenors to add/ delete Group members.

1. Log into Beacon ([www.u3abeacon.org.uk](http://www.u3abeacon.org.uk)). This will take you to the U3A Home Page – Administration – 5 columns with black headings.
2. In the Groups column, click on the blue “Groups” option.
3. This will take you to a list of all the Groups available at U3ATod. As you are the group Convenor, your group name will be shown in blue.
4. Click on your group name. NOT THE TICK BOX TO THE LEFT OF THE NAME.
5. In the Group Record for your group, click the blue heading, “Members”.
6. To add a new member, go to the bottom of the screen and below “Add member by name”, click on “select member”.
7. Select the member from the drop-down list of names that appears and click “Add”.
8. To remove a member from the group, go to the members list (go as far as 5 above)
9. Scroll down to the member you wish to remove from the group and click “remove” in the right- hand column against the member’s name.
10. In the confirmation box that appears, click “Remove”.
11. Then click “Home” and “Log Out”.



### Beacon Instructions for Convenors to **email Group members.**

1. Log into Beacon ([www.u3abeacon.org.uk](http://www.u3abeacon.org.uk)). This will take you to the U3A Home Page – Administration – 5 columns with black headings.
2. In the Groups column, click on the blue “Groups” option.
3. This will take you to a list of all the Groups available at U3ATod. As you are the group Convenor, your group name will be shown in blue.
4. Click on your group name. NOT THE TICK BOX TO THE LEFT OF THE NAME.
5. In the Group Record for your group, click the blue heading, “Members”.
6. At the top of the left- hand column, click “Select” and then click “E-mail only” from the drop-down box. This will tick the boxes for all group members. NB Members without email will also have a small envelope shown with a red line through it.
7. At the bottom of the list of group members, the default action “Send Email” will already be selected, so click “Do with selected”. This will take you to the email page for you to compose your message and add a title in the “Subject” box. Then click “Send”.
8. You will receive a message to say that your email has been sent.
9. As the Group Convenor, you will receive a copy of your email, irrespective of whether you tick the “Tick to receive a copy” box or not.
10. Then click “Home” and “Log Out”.

*NB You will need to make alternative arrangements to get your message to group members who are not on email.*

1. Click on “Edit” (right hand column) for the meeting you wish to update and add the “Topic” and “Details” information.
2. Click “Update”.
3. Tick the “Show Details” box (underneath the Group Schedule heading) to check that the new information you have provided is correct.
4. Click “Home” and “Log Out”

### Instructions for adding affiliate members to your group.

Once people who pay for membership at another u3a have completed the ‘Affiliate Membership Application Form’ for u3a Todmorden, they can be added to your group as they will be listed on the register of members on Beacon.

1. To find the Affiliate Membership Form, they need to access the web site [u3atod.org.uk](http://u3atod.org.uk)
2. Select ‘Join us’ and find the affiliate membership form which is at the bottom of the page underneath the photos.

3. Complete and return to the membership secretary.
4. Continue as for adding members.

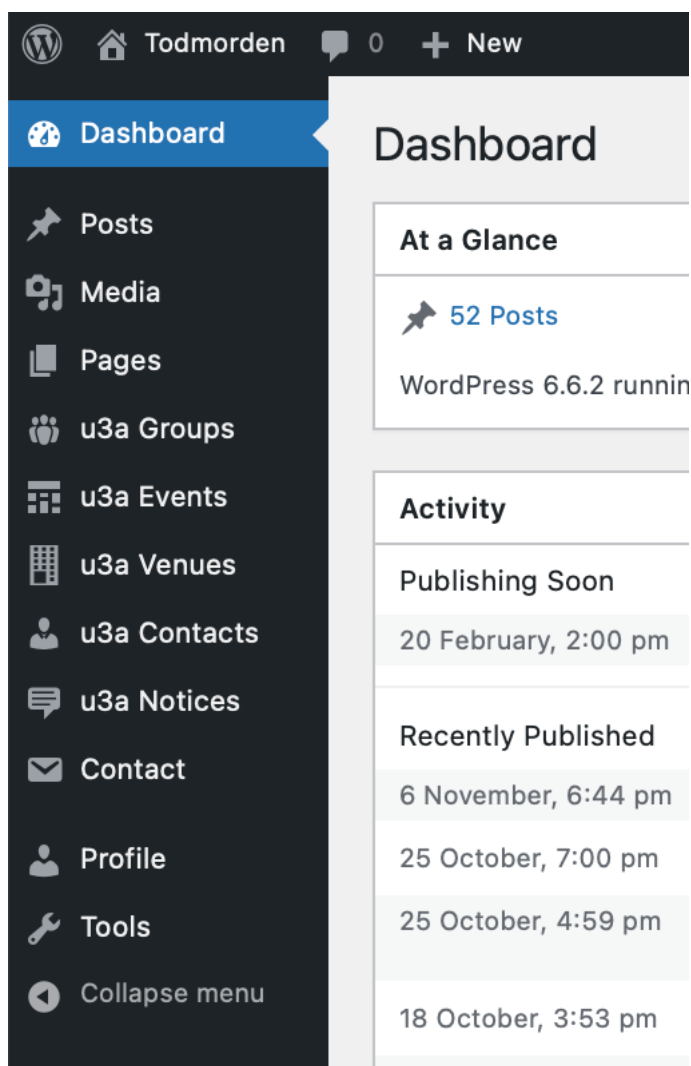
## Using the Website to advertise your group and its calendar.

Convenors should request a username and password from the Webmaster (email: [web@u3atod.org.uk](mailto:web@u3atod.org.uk)). The website is separate from Beacon, and your username and password are distinct from your Beacon credentials.

### To log in to the website as a convenor

Open the public-facing website as an ordinary member would see it: <https://u3atod.org.uk>.

Scroll down to find the **login** button at the bottom right of the Welcome page. Log in with the username and password you have been given. Usernames are normally your first and last names run together with no space between, all in lower-case. You will see the website *dashboard*, which has a menu of parts of the website you can revise or add to down the left-hand side.



### The Dashboard

When you first log in as an Editor user, the browser window shows the *WordPress Dashboard*, which lets you navigate to the actions you can perform on the Website.

The menu of editable content runs down the left of the page, in white on black. Through this menu, you can make changes to what users can read on the Website.

**Posts** are items of news that will automatically be presented in date order, most recent first, in places on the Website that have been designated to show them.

**Media** are images, movie files or sound files, that can be placed within posts or pages. PDF files for Website users to browse or download are also uploaded to the media library.

**Pages** differ from posts in that they are 'sticky', i.e. they can be thought of as permanent units of the website content, that can always be found via menus or links.

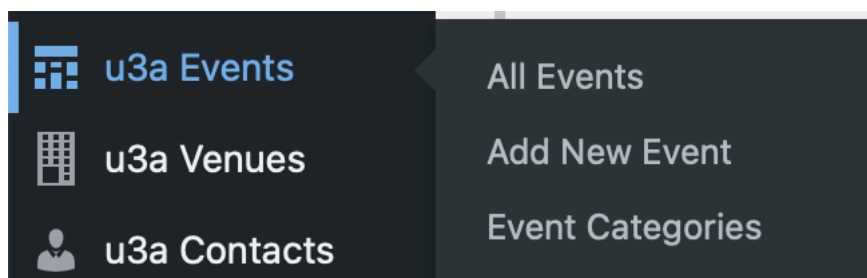
**u3a-specific content types** *Groups, events, venues, contacts and notices* are all special types of content that are

meaningful to u3a's. We particularly want all groups to keep the calendar of their forthcoming group sessions up to date as events on the website.



## Creating a new calendar event for a group session.

1. From the Dashboard, select **u3a Events** > **Add New Event**, as in the illustration below (the cursor was hovered over the u3a Events menu item, and the sub-menu expanded to the right. The sub-menu item **Add New Event** should be pressed).



2. Select **Group Session** as the *Event Category* using the pull-down list. (It is important that you don't select 'Meeting', because that category is reserved for monthly plenary meetings.)
3. Fill in the title, time, group, and place of the event on the respective fields in the form shown in Figure 1.
4. (Optional) Add any additional description and/or illustrations using the Block Editor (details below) where it says **Type / to choose a block**.
5. Press the blue **Publish** button at the top right of the page. You will be prompted to press **Publish** again to confirm you are ready to save it, and the event is saved.
6. (Optional) To check that your event is now in the calendar, you can view it using the popup black button that says **View Event**, after you have published it.
7. You should then see the list of All Events, which will include the one you've just published. Under each event, you will see links that let you edit, view, duplicate, or delete it.

## Duplicating events for groups that have the same activity each session

Unfortunately, the event editor does not allow a sequence of events with a defined frequency to be created in one go. What you can do instead is to **duplicate** the event and then change the date in the copy. (You can tell the copy from the original because its status will be Draft until you publish it.)

## Batch import of events

As an alternative to creating and duplicating events, you can write the details of a sequence of meetings in a csv file and ask [web@u3atod.org.uk](mailto:web@u3atod.org.uk) to upload it (as only Admin users are allowed to do this.). To make this easy for us, it is important that the information is presented in a standard way.

**If only the date changes in each session**, and all the other information is the same, you can simply send an email message listing the group name, venue, convenor, and start time, one to a line, then leave a blank line, and then list the dates one to a line. We will be able to compose the required csv file in Excel from that.

The screenshot shows the WordPress admin interface for creating a new event post. The main content area has a title field 'Enter title for event' and a placeholder for event information. The right sidebar contains settings for visibility, publish date, URL, and LiteSpeed options.

**Event Information**

- Event category \*
- Event date \*
- Start time  Optional
- Duration (days)  Optional
- Group  Only if the event is for a specific group.

**Event Settings**

- Visibility: Public
- Publish: Immediately
- URL: [u3atod.org.uk/u3a\\_events/auto-draft/](https://u3atod.org.uk/u3a_events/auto-draft/)
- ☐ Pending review
- Featured image
- Excerpt

**LiteSpeed Options**

- Disable Cache ☐
- Disable Image Lazyload ☐
- Disable VPI ☐

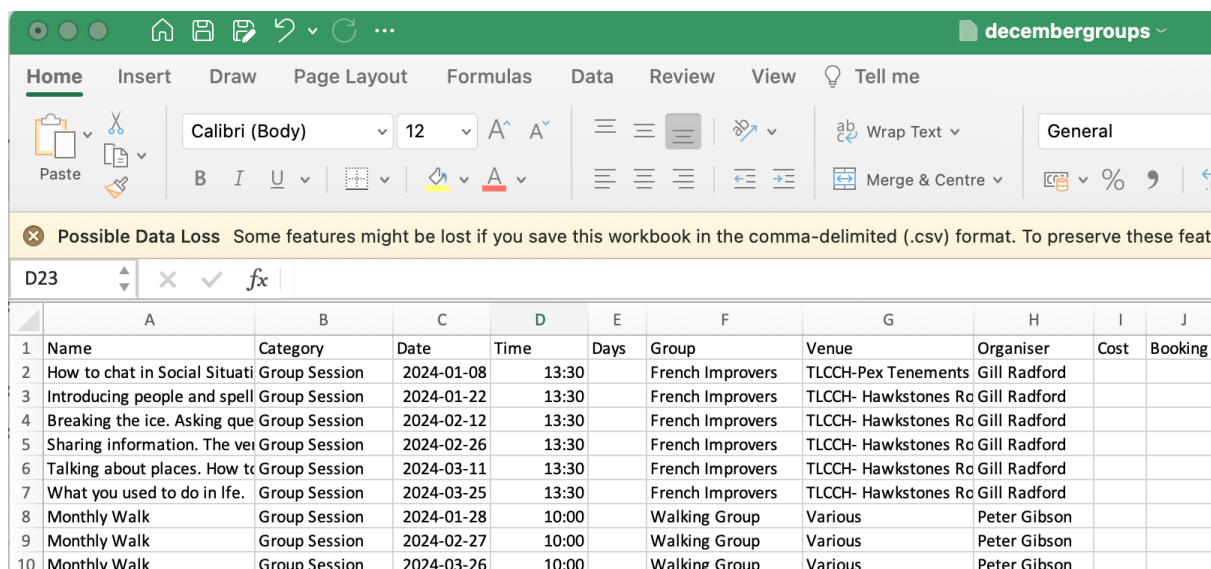
**Viewport Images**

Figure 1: Form for creating a calendar event for a group session.

Before sending the email, please check that the group name, venue and convenor are all written exactly as in your group's description on the website. The date should be written like 11:30, i.e. two pairs of digits separated by a colon. Most importantly, all the dates should be written like the following example: 2024-12-25, i.e. year, month and day in that order, separated by dashes.

If your group's activities have different titles each time, we would prefer you to compose the complete file in csv notation, with the same cautions as above about the spellings of

groups, convenors, venues and the formatting of dates and times. An example is shown in Figure 2, as viewed in Excel.



	A	B	C	D	E	F	G	H	I	J
	Name	Category	Date	Time	Days	Group	Venue	Organiser	Cost	Booking
1	How to chat in Social Situations	Group Session	2024-01-08	13:30		French Improvers	TLCCH- Pex Tenements	Gill Radford		
2	Introducing people and spell	Group Session	2024-01-22	13:30		French Improvers	TLCCH- Hawkstones Rg	Gill Radford		
3	Breaking the ice. Asking que	Group Session	2024-02-12	13:30		French Improvers	TLCCH- Hawkstones Rg	Gill Radford		
4	Sharing information. The vei	Group Session	2024-02-26	13:30		French Improvers	TLCCH- Hawkstones Rg	Gill Radford		
5	Talking about places. How to	Group Session	2024-03-11	13:30		French Improvers	TLCCH- Hawkstones Rg	Gill Radford		
6	What you used to do in life.	Group Session	2024-03-25	13:30		French Improvers	TLCCH- Hawkstones Rg	Gill Radford		
7	Monthly Walk	Group Session	2024-01-28	10:00		Walking Group	Various	Peter Gibson		
8	Monthly Walk	Group Session	2024-02-27	10:00		Walking Group	Various	Peter Gibson		
9	Monthly Walk	Group Session	2024-03-26	10:00		Walking Group	Various	Peter Gibson		

Figure 2: CSV file containing a batch of calendar events for upload to the website.

Full details on creating a CSV file of events are given online at <https://siteworks.u3a.org.uk/docs/u3a-siteworks-csv-import-and-export/>.

## Amending your Group Page on the website

Whether you are working with Groups, Venues, or other Posts on the website, the creation and editing of these all follows the same method as for Events. To revise an existing Group, start from the Dashboard menu, pick **Groups**, then **All Groups**, then scroll down you your group and click on the link marked Edit below its name. This will open an editor which looks just like the one for events, but with form fields appropriate to groups rather than events. As it's already been published, the **Publish** button is replaced by **Save**.

Whilst there are form fields for the essential information about a group, it's better to promote it with additional pictures and text. When you open a Group page in the Editor, that extra information is shown above the form fields. You can edit any of the text by placing your cursor in it and selecting a span to delete or copy and / or typing at the keyboard.

The WordPress *Block Editor* treats paragraphs and pictures as examples of blocks. This gives you the ability to create a visual design for the page of content, which will behave predictably when viewed on different devices.

Whenever your cursor is at a block boundary, you should see a placeholder text which says, in grey, **Type / to choose a block**, and below and to the right, a **+** symbol which marks the insertion point. Pressing that will bring up a menu of content types, which will

display a sample of 6 icons with the option to Browse All to see more. Examples of block types in use are Image, Media and Text, Gallery, Heading, List, Button Group.

## Media Library

To improve the visual appeal of the website, please consider if your Group page and Calendar entries can benefit from the inclusion of photographs you have taken.

All WordPress Websites have a *Media Library*, where you can upload media ‘assets’ that can be selected for inclusion in posts and pages. We would like to encourage group convenors and other members keen on photography to upload images illustrating group activity to the Media Library whenever they become available, even if they are not actively authoring a post or page.

### Uploading an image file to the Media Library

1. From the Dashboard menu, press the Media menu item and then ‘Add New Media File’.
2. Press the ‘Select Files’ button, and a file selection dialog will appear in front of the window:

Selecting a file and pressing the **Upload** button will result in it being added to the media library, provided it is of an acceptable file type and size. (The size limit is set to 2MB.)

## More information on website editing

More detail on how to use the block editor is given in the separate document entitled: *Adding content to the u3atod Website*.

You can also find more information while logged into the website by following links from the Help button on the Dashboard home page, in the panel u3a SiteWorks Information, or directly at <https://siteworks.u3a.org.uk/user-guide-betterdocs/>.

## **Member of another u3a**

If someone is a full member of another u3a they can attend any u3a Todmorden Group or event as an Affiliate member if there is space available. Where places are limited, priority will usually be given to full members of u3a Todmorden. There is currently no charge for Affiliate members.

They would need to complete an Affiliate membership form for u3a Todmorden so that they are registered on the Beacon system. In this way they can be sent group emails all safeguarding demanded of GDPR will be satisfied.

Affiliate members are expected to pay their share of the charge made by the group or event (e.g., room hire, refreshments, transport, etc.) in the same way as u3a Todmorden members.

## **Moving to the area**

If someone who is a member of another u3a has moved to the area and wishes to attend on a permanent basis they can do so as an Affiliate member until their existing u3a membership expires. After that, they are no longer eligible for Affiliate membership and must join u3a Todmorden. It should be reported to the Membership See [membership@u3atod.org.uk](mailto:membership@u3atod.org.uk).

## **Attendance**

If someone who is not a u3a member wishes to attend a group, they are permitted to attend two meetings free of charge (i.e. without joining the u3a)

If they wish to continue as a member of the group, they must join u3a Todmorden.

They can download the application form from the web site and bring it to next general meeting or post it to the address on the form.

## U3a Todmorden Documentation

### U3a Insurance

Membership of the u3a and affiliation to the national u3a means that recognised activities of Todmorden or any other u3a are covered by Public Liability Insurance so that group convenors and group activities are insured against the risk of problems that may arise as a direct result of the u3a activity.

U3a Trust membership also provides cover for legal costs and for damage or loss that is caused by u3a activities including within the homes of u3a members who are hosting interest groups. As with all insurance policies, there are limits to the liabilities of the u3a but the u3aTrust national office will advise in specific circumstances. Insurance is a very important element of our membership of the National u3a Trust. It provides protection to the group convenors and all the volunteers who help to make the u3a work, as well as to individual members and to the u3a. If an Interest Group wants to undertake some exceptional activity or anything that might be considered particularly risky, the Group Convenor should check the insurance position with the Groups Coordinator before going ahead.

For each individual member of the u3a to be covered under the insurance policy, all group members must be members of u3a. It is acceptable for someone to attend two meetings before joining with the understanding that there would be no insurance cover until they had joined. Even if interest group members do not want to participate in any other u3a activity, they must join the u3a. The Group Convenor must also be a member of u3a Todmorden.

Group Convenors should keep the Members list on the Beacon System up to date for their group. Members who cannot be found on the system are probably not members of u3a Todmorden. Check with the Membership Secretary if you are unsure. Members whose names appear in red have not renewed their subscription.

## U3a Todmorden Documentation

### Data Protection.

#### GENERAL GUIDELINES FOR COMMITTEE MEMBERS AND CONVENORS.

The only people able to access data covered by this policy should be those who need to communicate with or provide a service to the members of the U3A.

Data should not be shared informally or outside of the U3A.

The U3A will provide advice to committee members and group convenors to help them understand their responsibilities when handling personal data.

Committee Members and group convenors should keep all data secure, by taking sensible precautions and following the guidelines below.

Strong passwords must be used, and they should never be shared.

Personal data should not be shared outside of the U3A unless with prior consent and/or for specific and agreed reasons.

Member information should be reviewed, and consent refreshed periodically via the membership renewal process or when policy is changed.

U3As should request help from National Office if they are unsure about any aspect of data protection.



## **u3a Todmorden Documentation**

### **Publicity and Communications**

Communications and publicity are a vital part of the running of the u3a: internal communications keep all members informed about what is happening in u3a Todmorden, and external publicity promotes u3a Todmorden to a wider audience and attracts new members.

The Communications Group is a subcommittee of the u3a Todmorden Committee and was established to develop and coordinate our internal communications and external publicity.

Various channels are used for communications/publicity:

- monthly reports from Chairman and Groups Coordinator
- publicity leaflets and posters
- press releases
- web site which includes the Beacon diary
- Facebook

If your group is holding a special meeting or event which is open to all members, please let the Groups Coordinator know (providing brief details, time place etc.) who can arrange for the information to be included in the Chairman's Report and/or announced at the monthly meeting and can put it on the website.

If you have an event of wider interest (e.g., an exhibition) a press release can be issued. You need to provide a brief report of the event (with photograph if appropriate) and forward it to the Groups Coordinator or directly to the Press Officer.

It is important that the web site is kept fresh with new material. Please let the Groups Coordinator know of developments in your group and supply photographs which can then be posted on the web site and Facebook.

It is particularly important that the schedule of events in Beacon (including details of any equipment needed) is kept up to date so that members can easily find out when and where a group is meeting. It also helps in planning new groups and other events in an increasingly crowded diary.

## U3a Todmorden Documentation

### Equipment for Use by U3A Special Interest Groups

#### Equipment Available at The Fielden Centre

- Laptop computer with Microsoft Office 2016 (for PowerPoint presentations and other Office applications), Photoshop Elements 14 and VLC Media Player software (for playing DVDs)
- Digital projector (for use with laptop)
- Powered speakers (for use with laptop)
- Drop-down projection screens in hall and upstairs meeting room
- Megamouth portable PA system with hand-held or ear hook radio mic and connecting leads for other audio sources.
- 1-way and 4-way 13amp extension reels
- A selection of tables
- Other equipment which is the property of specific groups
- Wi-Fi facilities (c/o the Fielden Centre – access details displayed in the upstairs room)

#### Reserving Equipment

Group Convenors (or their designated deputies) can reserve any of this equipment for use by their group by including a note of it in the Detail field of the Group meeting entries in the Beacon Schedule.

#### Equipment for use at an alternative location

If equipment from storage at either TCRC or the Fielden Centre is required for a Group's use at another venue, this must be shown the Detail field of the Group meeting entries in the Beacon Schedule – indicating the total time period when the equipment will be away from the storage cupboard. It must also be recorded in the record book retained in the relevant cupboard, with a signature and date/time both for being taken away from storage and for being returned.

NB 1. Equipment may only be taken away from storage if it has not already been booked in the Beacon Schedule by another group.

NB2. It is NOT enough to record the removal of equipment only in the record book – it is essential that it is also shown in the Beacon Schedule.

#### Access to Equipment

For security reasons, information on how to access the equipment will only be provided to Convenors when necessary. Contact the committee for details [committee@u3atod.org.uk](mailto:committee@u3atod.org.uk).



## PART THREE.

### U3a TODMORDEN FORMS AND TEMPLATES

#### ACCIDENT FORM.

Name of injured person/address /telephone number:

Name/address/telephone number of others involved:

Date and time of accident:

Location:

Nature of accident / circumstances:

Injury details/Property damage:

Name/address/telephone number of persons causing injury or damage:

Witnessed by: Address:

Telephone number: Email



Action taken:

Was any specialised assistance required at the scene? If so, please give details:

Was any medical advice sought afterwards? If so, please give details

Name of convenor.....Telephone number.....

Email of both parties.....

Signed ..... (injured party) Signed .....Convenor

DATE.....



## VENUE RISK ASSESSMENT CHECKLIST

### Category: Risk Assessments

<b>u3a Name</b>	
<b>Interest Group</b>	
<b>Date</b>	<b>Location/Postcode</b>
<b>Description of Activity</b>	

Hazard	Yes	No	N/A	Comments
1. Is the access suitable for the group attending the activity especially anybody with limited mobility?				
2. Is wheelchair access adequate?				
3. Is the area free from obstruction and trip hazards?				
4. Are there adequate means of escape in an emergency?				
5. Are there appropriate direction signs to aid escape?				
6. Is there a Fire Alarm?				
7. Is there Emergency Lighting?				
8. Is there a designated assembly point? Where is it?				
9. Is there an emergency procedure for the building? Do you have a copy?				
10. Is seating always laid out?				
11. Is it a u3a responsibility before and after the activity to lay out seating?				
12. Is there a kitchen? Is the kitchen adequate and hygienic? Are food safe cleaning materials available? Has the kettle been visually safety checked?				
13. Is equipment being brought to the venue? Has it been checked?				
14. Are the toilet facilities adequate and accessible? Has it been checked?				



15. Is there a First Aid box and if so where is it located?				
16. Does it have a sound system with an induction loop?				
17. Other (define)				
Additional Information				



## WORKSHOP ACTIVITY RISK ASSESSMENT CHECKLIST

Category: Risk Assessments

u3a Name	
Interest Group	
Date	Location/Postcode
Description of Activity	

Hazard	Yes	No	N/A	Comments
Use of Hand Tools				
18. Are tools sharp and in good condition? (eg no damage, splitting of handles etc)				
Electric Power Tools				
1. Portable Appliance tested?				
19. Double Insulated?				
20. Visual inspection of leads and connections made?				
Fixed Machinery(lathes, etc)				
1. Are electrical connections & wiring in good condition?				
2. Is the equipment suitably earthed?				
3. Are there electrical isolation systems in place?				
4. Is there suitable extraction/ventilation in place where appropriate to the machine?				
5. Are appropriate guards fitted and in good condition?				
Personal Protective Equipment (PPE)				
1. Does the activity require the following: a) Eye protection b) Hearing protection c) Dust mask d) Gloves e) Safety shoes				
Hazardous Materials				





1. Are the materials used hazardous? (ie toxic, harmful, irritant, dusty etc. see container label)				
2. Does the material require special precautions in use? ( eg the wearing of PPE?)				
<b>Workplace Hazards</b>				
1. Are there clear safe systems of work and operation guidance posted for the machines, identifying the specific safety cut offs in place, or some instruction available to cover these issues?				
2. Are the floors free from trip hazards and escape routes clear?				
3. Are precautions in place to prevent or respond to fire?				
4. Does the activity require special precautions? Eg removal of jewellery, tying back long hair?				

#### Exceptional Circumstances

There may be reasons why additional conditions may have to be taken into consideration when completing this risk assessment.

When completing a risk assessment in exceptional circumstances you need to consider how this will impact on the activity, what additional measures or changes you will need to make for each identified hazard in order to reduce risks involved in running the activity. These changes will need to be incorporated into the assessment of how hazards can be reduced or avoided to respond appropriately to the exceptional circumstances you are facing.

Notes for exceptional circumstances:
--------------------------------------

Signed

Dated:

<b>u3a</b>	<b>Workshop Activity Risk Assessment Checklist – u3a-KMS-FRM-013</b>	<b>The Third Age Trust</b>
Version	Description of changes	Date
2.0	Updated formatting s	11/10/2021



## SPORTING ACTIVITY RISK ASSESSMENT CHECKLIST

### Category: Risk Assessments

<b>u3a Name:</b>	
<b>Interest Group: Walking Cricket</b>	
<b>Date: 10.8.22</b>	<b>Location/Postcode:</b>
<b>Description of Activity: Playing the game of Walking Cricket (WC) with two teams of eight people</b>	

Hazard	Yes	No	N/A	Comments
<b>Use of Equipment</b>				
21. Are bats and balls of the appropriate standard for the level of the game?	✓			
22. Are participants aware that bats can hit others and balls can hurt when being caught?	✓			
<b>Personal Protective Equipment (PPE)</b>				
2. Does the activity require the following:				
f) Appropriate sports shoes?	✓	✓		
g) Other protective equipment (arm guards, pads etc.?)				
h) Are gloves available for wicket keepers?	✓			
<b>Venue Hazards</b>				
5. Are the floors free from trip hazards and escape routes clear?	✓			
6. Are precautions in place to prevent or respond to fire?	✓			
7. Does the activity require special precautions? E.g. removal of jewellery, tying back long hair?	✓			
<b>Activity Hazards</b>				
1. Are players aware that WC balls will hurt when being caught or when being attempted to be caught?	✓			
2. Are spectators aware that balls may be hit in their direction and they need to move or duck?	✓			

#### Exceptional Circumstances

When completing a risk assessment in exceptional circumstances you need to consider how this will impact on the activity, what additional measures or changes you will need to make for each identified hazard in order to reduce risks

involved in running the activity. These changes will need to be incorporated into the assessment of how hazards can be reduced or avoided to respond appropriately to the exceptional circumstances you are facing.

<p>Notes for exceptional circumstances:</p> <p>All participants are informed that when playing a competitive game in their latter years (60+ years) they need to be aware of three factors:</p> <ol style="list-style-type: none"> <li>1. The fact that players minds think a sporting response is possible (catch, a run), but physically this is not possible to due to the imitations of age and maybe medical conditions</li> <li>2. Awareness of an action before it is carried out</li> <li>3. Remember that this is Walking Cricket and therefore ever thing should be done at a walk and not a response run.</li> </ol>		
<p>Signed by WC Convenor</p>		<p>Dated:</p> <p>10.8.22</p>

u3a	Workshop Activity Risk Assessment Checklist – u3a-KMS-FRM-013		The Third Age Trust
	Version	Description of changes	Date
	2.0	Updated formatting s	11/10/2021