

Guidance notes for Trips, Holiday Organisers and Social Events

Coach trips using a commercial coach company can involve Hucknall & District U3A in liability for large sums of money. The Executive Committee is happy to support such activities provided the following guidelines have been followed. However, permission must be sought from the Committee when a general, non-interest group, event is proposed.

Interest groups should fund themselves for any trips etc., however a non-group activity, if necessary could apply for a loan from the Committee on the strict understanding that this will be repaid to the Hucknall & District U3A.

Members of Hucknall & District U3A who undertake to organise a trip or holiday in the name of the U3A will be responsible for organising and receiving the monies and for banking using the Hucknall & District U3A Social Account.

A. Outing – day duration - Coach or Mini Bus

1. Decide on a trip/outing/holiday. Determine, dates when the venue is available to visit, the entry fees and what discounts, concessions, organiser free places etc. will be available. Determine the budget transport costs, include a small contingency, we recommend 10%. The contingency element is important as there may be unforeseen expenses (mileage costs incurred through incidents on the planned route needing a diversion).
2. Calculate the total budget costs for the trip/outing/holiday. In addition calculate a price per person to give an indicative budget price. Calculate a 'break even' point for the trip/outing/holiday.
3. Circulate all members through the web page, newsletter and the monthly meeting to obtain interest (where appropriate members to use the booking form available on the website). For general trips interest group trips may be filled with the group.
4. A deadline must be set when the trip bookings will close.
5. Based on the number of members who are financially committed or have made a payment, an actual cost for the trip must now be determined. This must be tested against the calculated 'break even' point. If it fails then the trip must be cancelled and monies refunded.
6. Book the transport for the trip. Ideally, if a coach is being used, two quotations should be obtained from independent operators. Inform the transport operator that the booking is made provisional and obtain a cancellation date when the coach company needs confirmation. Ensure the coach firm will provide an invoice in the name of Hucknall & District U3A, after the trip has taken place. A deposit is normally required by the transport operator, with the balance being payable after the trip.

7. Make a booking at the venue. Again ask the venue operators to invoice for payment in the name of Hucknall & District U3A. We strongly advise that all monies should pass through the Social Account.
 8. **Ensure everyone is aware that there will be no refunds unless an unoccupied place can be resold.**
 - (a) If necessary, keep a waiting list in the event of late withdrawals. If a member is not able to take up their booking they may sell their ticket through the trip organiser, to the next name on the waiting list.
 - (b) If there is no waiting list the member may be entitled to a refund of any entrance fees not paid in advance by the organiser. Coach costs cannot be refunded.
 9. Bookings will only be confirmed on receipt of the full trip fee by cheque made payable to the Hucknall & District U3A Account.
 10. If there is a financial surplus for the trip, any amount more than £1 per member should be returned to the members, rounded down to the nearest 50p. Any amount less than £1.00 per member should be returned to the Hucknall & District U3A current account for general trips or retained in the Hucknall & District U3A social account, group fund for group trips.
 11. Where the Social Account is used a full balance sheet must be completed for all trips/outings/holidays and presented to the Treasurer, as soon as possible after the event.
- B. Trips in shared cars
If members' own cars are used to go on a trip, it is suggested that 20p per mile should be paid to the driver and that the costs of such payment, be shared by the passengers receiving a lift. However, it is recognized that such a payment is at the discretion of the driver. Journey costings are also available from Google Maps/Directions.
Car sharing: U3A members can offer lifts to other U3A members without compromising their own car insurance. Any accident which occurred during a U3A trip would have to be dealt with through the member's own car insurance and would be outside the scope of the 3rd party cover.
- C. Make any non U3A Member aware that they will not be covered by U3A insurance. Non-U3A members may only attend an event/trip on a one-off basis, for example, it would only be permissible to go on a coach trip on a single occasion, where there are particular circumstances (U3A insurance only provides cover for U3A members/organisers against a claim for negligence from a 3rd party, i.e. someone not connected with the U3A)
- D. Holidays: All holidays, i.e. longer than a day-trip, should only be organised through an ATOL bonded travel agent who is also a member of ABTA.
- E. Personal Injury Cover: U3A Public liability cover does not automatically provide Personal Accident insurance. For a claim against the U3A, a person who has suffered an injury while taking part in a U3A activity would have to prove that the U3A or one of its members had been negligent.