

## Guidance notes for Trips, Holiday Organisers and Social Events

Coach trips using a commercial coach company can involve Hucknall & District u3a (hereafter called the 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 requiring u3a support 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 u3a.

Members of the u3a who undertake to organise a one off trip or holiday in the name of the u3a will be responsible for organising and receiving the monies and for banking using the u3a Social Account.

### A. Outing – day duration – holiday – using coach or mini bus

- 1) Decide on venue/holiday. Determine dates when venue is available to visit, entry fees together with discounts/concessions, organiser free places etc. applicable. Determine the budget transport costs and any parking fees plus tips, include a contingency in case of unforeseen costs, we recommend 10%.
- 2) Calculate the total budget costs for the trip/holiday. Calculate a price per person to give a 'break even' point for the trip/holiday.
- 3) Circulate all members through the web page, social media, newsletter and the monthly meeting to obtain interest. Interest group trips may be filled within the group.
- 4) For one-off events it may be necessary to set a bookings deadline in order to assess the event's viability.
- 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) Booking the transport for the trip: good practice suggestions.
  - a) Ideally, if a coach is being used, two quotations should be obtained from independent operators in order to obtain best value for the u3a. Best value does not have to be the cheapest quotation, take in to account the quality of vehicle and driver, reliability, safety record, feedback from other users etc., build a working relationship with the company if using regularly and/or in conjunction with other interest groups.
  - b) Inform the transport operator that the booking is made provisional and obtain a cancellation date when the coach company needs confirmation. Ensure the coach company 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, retain copies of correspondence for your records.

- 7) Making a booking at a venue. Again, ask the venue operator to invoice for payment in the name of Hucknall & District u3a. We strongly advise that all monies 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 paid to the Hucknall & District u3a Social Account. Group event bookings will be confirmed by the organiser following a successful application.
- 10) If there is a financial surplus from the trip, it is to be retained in the Hucknall & District u3a Social Account if financially supported by the u3a, or retained in the group fund for group funded 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 costs of such payment be shared equally by everyone in the vehicle. However, it is recognized that such a payment is at the discretion of the driver and their insurer. Journey costings are also available from Google maps/directions.

Car Sharing: u3a members can generally 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 3<sup>rd</sup> party cover.

#### **C. U3A Insurance**

Make any non u3a member aware that they will not be covered by the u3a insurance. Non u3a members may only attend an event/trip on a one off basis, for example, it would 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 of negligence from a 3<sup>rd</sup> party, i.e. someone not connected with the u3a.)

#### **D. Holidays**

All holidays, i.e. longer than a day trip, should only be organised direct with the tour operator or through a travel agent, each of which must hold the appropriate ATOL bond and/or ABTA membership.

Holidays that are classed as 'Packages', are subject to 'The Package Travel and Linked Travel Arrangements Regulations 2018', if the u3a runs more than 10 qualifying events per year this will be considered acting as a tour operator and the u3a should contact National Office for further advice. A qualifying event consists of overnight accommodation plus at least one other element. These can be carriage (transport), accommodation or other included tourist service e.g. hire of equipment, entrance fees or spa treatment. These must be stated as inclusive or booked at the same time as the holiday.

[https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment\\_data/file/1093536/package-travel-regulations-2018-guidance.pdf](https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/1093536/package-travel-regulations-2018-guidance.pdf)

And: <https://www.abta.com/tips-and-advice>

Where possible it is less problematical if holidays are paid directly by the member to the holiday company or travel agent.

#### **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 whilst taking part in a u3a activity would have to prove that the u3a or one of its members had been negligent.