## Outings Policy and Guidance

This policy sets out the requirements for arranging outings on behalf of Southwell u3a.

**Objectives:**

- To provide a framework which enables members to participate in outings in accordance with the Third Age Trust's insurance policies.
- To provide guidance for anyone arranging outings on behalf of Southwell u3a.

This policy applies to outings, which are day visits (less than 24 hours.)

1. All Member Outings (arranged by the Social Committee)
2. Group Outings (arranged by Group Leaders)
3. Concert trips

For any outings which would involve an overnight stay, please contact the u3a Chair and Treasurer for advice before making any arrangements, as this requires specific advice about financial risk and insurance cover.

### Insurance

Outings **for members only,** that are less than 24 hours and do not include an overnight stay are covered by the normal Third Age Trust liability insurances. The Trust does not offer Travel Insurance and the responsibility for this is with the individual.

Outings organisers must ensure that everyone travelling on the outing is a u3a member and should not permit anyone who is not a member to travel. This applies even if it means that places on an outing are not filled. Vacancies could be offered to members of other u3as if this was deemed appropriate.

Carers / companions who are not u3a members can accompany a member on an outing, but this requires payment of the relevant amount for the outing. The guidance from Third Age Trust is that should a member not be able to participate independently in u3a activities a carer/companion is essential as it is not acceptable for insurance reasons for the responsibility for care to be left to fellow members unless there is a specific arrangement in place with an individual member who may well be a friend.

### Organising an outing

Coach trips using a commercial coach can involve Southwell u3a in liability for large sums of money. The Committee is happy to support such activities. The Committee should be informed before any steps are taken to organise the trip, so that the details can be minuted and the trip covered by our insurance. Generally, permission will be given if we are satisfied that the organiser will follow the guidelines below. The Social Committee normally has a representative on the main committee, and submits regular reports. The Concert organiser is asked to submit a brief report at the start and end of each season. Group Leaders must inform the Committee of their plans before details are finalised.

Outings must be self-financing with all costs being calculated in advance.

If a coach is used, two quotations should initially be obtained. It can be convenient to use a regular company but an additional quote should be obtained, to check that pricing is still competitive. The booking should be provisional and confirmed only when the 'break-even' point has been reached. Find out when the coach firm will invoice the u3a. A deposit is normally required, with the balance being payable after the trip.

**Advertising forthcoming Outings**

a) For Outings arranged by the Social Committee, the notification should go out to the entire membership of the u3a.
b) For Group Outings, the notification should only go out to members of that group. If there are spare places available on an outing after members of the group have had reasonable time to respond, then any spare places can be offered to the wider membership within the u3a.
c) All outings should be offered to those eligible on a first come, first served basis. Places are secured only on receipt of payment. Where an outing is fully subscribed, organisers are recommended to keep a reserve list in case of cancellations
d) The organiser of the Outing should keep a record of the bookings and payments made.

**Outing Programme / Location**

When considering possible locations / programmes for outings, organisers should bear in mind the object of u3a which is 'the advancement of education by all means including associated activities conducive to learning and personal development.'

Outings arranged by Groups should be pertinent to the nature of the group. Some groups by their nature involve transport virtually every time they meet. (E.g. walking groups, museum visiting, theatre groups, etc.) These groups need not follow all the guidelines below UNLESS they are collecting and spending members' money. Banking facilities in this instance should be through 'The Groups Account'.

**Outing Dates**

Group Leaders are asked to liaise with the Committee about dates before arranging any outings which are other than part of their usual meeting. This will help to avoid clashes of dates and enable members who wish to take part in the full range of u3a activities on offer.

**Finances**

I. The Social and Trips Committee organise events on a regular basis and liaise closely with the Treasurer for the Social account.
II. Any Group Leader making arrangements for an outing should discuss the arrangements with the Treasurer, to agree pricing, payments and the method of

collecting and banking the money. If an individual member wants to organise a visit, it is vital that they inform the Committee before proceeding.

III. The pricing of outings should be on the basis of breaking even. Where there are multiple outings arranged in a year, the aim should be to break even over the course of the year. In the event of a deficit on a group outing, this is the responsibility of the group. The Social account has a float of £500 to allow for making payments before contributions are collected. It is often more convenient to include a gratuity, e.g. to the Coach driver, in the cost. This should be made clear to members.

IV. Concerts, that operate on a season by season breakeven can carry forward a float to use for future concerts that may not individually break even. Before the start of each concert season the Concert Trips organiser should agree the seasonal breakeven calculation, that sets prices for each seat and coach cost, with the Treasurer. Prices can be adjusted partway through the season if needed.

V. Members who organise an outing for u3a members should not benefit if a venue should offer a free place. The value of the benefit should be shared by all members on the outing.

## Bookings

1. Though a provisional place may be booked, it will not be confirmed until payment is received.
2. Payment can be made at the monthly meeting by cheque payable to Southwell u3a – NOT to the trip organiser. The organiser may accept cash payments, if a member does not have a cheque book, or a cheque from another member. Receipts should be given for cash. The cheques should be sent to the relevant sub- committee treasurer as soon as the break-even point is reached. Bookings for Concert trips can be made by card at the monthly meeting.

3. If a group cannot achieve the break-even point, then the trip must be cancelled and all cheques returned or destroyed by agreement.

4. In the event of members cancelling their booking, refunds are only available if the place can be filled from the reserve list held. The list of members taking part in the outing should be finalised a week prior to the outing taking place, as most venues require confirmation at that point, and to enable the necessary Health and Safety documents to be completed and submitted. After this time, there are usually no substitutions or refunds. Refunds are not available for members who do not attend on the day of the outing. 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.

5. All income for outings should be passed to the Treasurer for banking four working days prior to the outing taking place.

6. Invoices for admission to venues and coach hire should be passed to the relevant Treasurer for payment allowing reasonable time for payments to be made so that they

reach the venue or coach company in accordance with their payment terms. Venues and coach companies should be advised that u3a's preferred payment method is BACS and organisers should obtain the necessary bank details from suppliers.

7. If there is a financial surplus for the trip, any amount less than £1 per member should be passed to the treasurer for the benefit of Southwell u3a. Amounts in excess of £1 per member should be returned to the members. Refunds should be in whole pounds and any other residue should be returned to the treasurer, (e.g. If the surplus is £3.79 per member, then the refund per member is £3.00 and £0.79 per member would be returned to u3a funds).

8. As soon as possible after the trip a financial report should be sent to the relevant sub-committee treasurer. All expenditure should be supported by receipts/invoices whatever the method of payment.

**Health and Safety**

Southwell u3a has a duty of care towards its members. Their safety and wellbeing at any u3a organised activity is paramount. All reasonable steps are taken to protect members who have elected to go on a u3a organised outing, to provide the organiser with reassurance that they have fulfilled their responsibilities.

- A list of participants on the trip, together with their emergency contact details should be left with another member of the Trips Committee, who is not on the trip, for use in case of accident.
- It is recommended that participants are encouraged to carry some form of identity, such as an ICE or membership card.
- A member can be accompanied by a carer if needed, and the carer would need to pay the full cost, but would be covered by our insurance.

**Overnight Trips**

NB Groups wishing to organise an overnight(s) trip for their group MUST seek the prior permission of the u3a Committee. Failure to do this may invalidate the u3a insurance.

Such a trip can only be arranged in the following ways:

1. Via a commercial Tour Operator. The trip is arranged via a travel agent/operator who will organise all aspects of the trip and provide the Tour Operator's Liability Insurance. All monies, including the deposits, should be paid by cheque to Southwell u3a, who will then pay the Tour Operator. A balance sheet should be submitted to the Groups treasurer as soon as possible. Please use the standard register for collecting money and the standard balance sheet.

2. If there is NO group booking, with members making their own arrangements for booking accommodation, and paying individually, insurance cover is given by the u3a provided that every aspect of the trip is arranged individually and there is no group

booking or financial element. Failure to do this may mean that the person overseeing and making the arrangements on others' behalf becomes the tour operator and may be personally liable in the event of an accident or claim for damages. This is the view of the Third Age Trust, and it is essential that it is adhered to.

September 2025

Appendix 1

**Southwell u3a - Contact Details for Outings**

I am providing the information requested below on the understanding that:

- It is used only for the purpose of an u3a Outings Organiser needing to contact me.
- or use my emergency contact number before, during or after an u3a Outing.
- It will be securely stored by an Outings Organiser.
- It is my responsibility to ensure that the information supplied is accurate and to inform the Outings Organiser of any changes.
- I can request at any time that the information is destroyed.

Name ________________________________ Memb. No. _______________

Email address ______________________________________________________

Mobile Phone No. ___________________________________________________

Emergency Contact Name ____________________________________________

Emergency Contact Mobile Phone No. __________________________________

Signed ______________________________ Date________________________