Guidance for Organisers of Social Events, Day Trips, Group Bookings and Overnight Trips

If you are thinking of organising a trip/event for HVu3a or your u3a group – then thank you! This document is intended to provide straightforward advice and guidance on how to manage the planning process. When thinking about transport organisers may wish to consider public transport and if using cars the possibility of people offering lifts to reduce the number of car journeys. This guidance is designed for any trip that includes one (or all) of the following criteria:

- Uses hired transport
- There is a group payment (e.g., entrance to a historic site, or tickets to an event)
- Has an overnight stay

If your trip does not include any of the above, then this document does not apply.

If unsure about anything please see Hawkwell Village u3a Policy Guide section 8 and/or contact a committee member.

The committee need to approve a trip/event before any confirmed booking is made. This is to meet the terms of u3a insurance, to confirm that funds would be available to cover any financial shortfall, and also to comply with our duty of care to our members. This does not stop you asking people if they will be interested in the trip/event to gauge interest before asking the committee.

Trips and events should aim to be self-financing, however, the committee may decide to run certain trips/events at a planned loss, and authorise the bypass of some of the steps below, if necessary.

First Steps

Please be aware that no bookings or payments should be made for any proposed trip/event without the prior agreement of the Committee. Listed below is the sort of information required in order for the Committee to make a speedy decision. Please contact the Treasurer or Treasurer's Assistant, who will seek committee approval on your behalf. A decision may be delayed if the Committee needs clarification on any information submitted.

- Date of trip/event
- Brief description of trip/event
- If transport has to be booked or are people making their own way to the event
- Cost per person of trip/event– this to include, for example:
    - Entry fees/tickets
    - If any discounts/concessions/free places are available
    - Transport costs – if using coaches/minibuses, then, if possible, two quotes should be obtained from commercial coach/minibus companies only
    - Meal costs (if relevant)
    - Hotel costs (including single person supplement if relevant)
- Number of places available
- Minimum number of places to be filled to break even
- Target audience (i.e., an interest group or the whole u3a membership)
- Cancellation terms/fees for all elements.

Initially, you may wish to cost for a below-full capacity trip, to achieve your break-even point. This cost can be reduced if initial bookings indicate it can be run at full capacity. If you want help with costings, please contact the Treasurer, or Treasurer's Assistant, who will be happy to help.

Once Approval is Granted For a Day Trip/Event (Not using Tour Operator, e.g. Kirbys)

Pitch your trip/event idea to the intended audience, including a closing date for applications. If there is a need to send details to all members, on request a committee member will email on your behalf. After the closing date a decision to proceed or not needs to be made, based on the number of people still committed to going on the trip/event. If the minimum number of places has not been reached to the break-even point, please contact the committee as support may be available. If the minimum number of people needed to achieve the break-even point has been reached, then the trip/event can go ahead as follows:

1. Book the transport for the trip. Inform the transport operator that the booking is made provisionally and obtain a date by when the coach company needs payment or notification of cancellation of the trip. The transport operator will need to provide an invoice in the name of Hawkwell Village u3a, after the trip has taken place.

2. Make a booking at the venue. The venue operators will need to invoice for payment in the name of Hawkwell Village u3a, and a date also agreed for when payment or notification of cancellation of the trip is required. If it is a purchase of tickets, the u3a have debit cards that can make the purchase if needed.

3. Participants will now need to pay for the trip. Payment should be by cheque payable to Hawkwell Village u3a, or BACS to the Hawkwell Village u3a social account (Sort Code 20 70 93 Account Number 93836673). As a general rule we no longer accept cash however if cash payment is received it should be passed to the Treasurer or Treasurer's Assistant as soon as possible.

4. Ensure all participants are aware a refund cannot be guaranteed if the participant subsequently cancels, unless their place can be resold via the waiting list or via the organiser.

5. If you need to send any participant a ticket or confirmation by post, you should request a stamped addressed envelope with the booking payment or cost it into the ticket price.

Procedures For a Trip/Holiday/Overnight Trip – via Tour Operator

Once the committee have agreed the trip, it can then be pitched to the intended audience. If there is a need to send details to all members, a committee member will email on your behalf on request. When the minimum number of deposits have been received then the trip can be confirmed with the Tour Operator.

If the trip is organised through a commercial Tour Operator/travel agent/operator they will organise all aspects of the trip and provide the Tour Operator's Liability Insurance. All monies, including the deposits, must be made to the tour operator not HVu3a. Refunds for cancellations will be at the discretion of the Tour Operator, provided any such refunds do not affect the cost of the trip for the other participants.

Additional Requirements

1. In the event of the trip not being full, in order to break even spare tickets ~~should~~ could be offered out to neighbouring u3a's whose members are covered by u3a insurance.

2. A non u3a member that is attending as a carer for a HVu3a member is covered by any u3a insurance that may be available.

3. A temporary group can be created in Beacon to record and easily communicate by email to the participants.

4. Trip organisers should give their mobile number to trip participants and all participants should carry some form of identity, such as their I.C.E. cards. It would also be good practice for the trip organiser to hold mobile phone numbers for all trip participants for the duration of the trip.

5. A straightforward Safety Checklist should be completed to enable reduction of any risks identified.

6. The benefit of any free, or discounted places or tickets, must be shared amongst all participants.

7. For any cash tips that are paid from money included in the ticket price, please complete a tip receipt form and forward to the Treasurer's Assistant or Treasurer. For tips over £30, another participant is required to witness the handing over of the tip (or payment of a card tip). The form is available from our website https://u3asites.org.uk/hawkwell-village/page/122163 or by this link Tip receipt form

Hawkwell Village u3a Committee
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