

Educational Trips, Holidays, Activities and Events – Policy & Guidance

This document provides guidance and policy relating to educational trips, holidays, activities, and events.

Group Leaders, and other members of our u3a can and do organise events outside the usual Group Meetings; this policy includes all such events which may be formal or informal.

In this policy/guidance:

- (i) an 'informal event' is one where a particular venue or activity is notified by a L&M u3a member (or members) to other L&M u3a members who can then choose to join the venue or activity by making their own individual booking(s) or arrangements; for example: for travel, tickets, meals or accommodation.
- (ii) a 'formal event' is one where a particular venue or activity is booked or organised by a L&M u3a group member (or members) for other L&M u3a members and who also takes responsibility for the overall booking or arrangements at that venue or activity.

The aim of this policy is to:

- protect the interests of all members
- ensure the viability of the event
- ensure procedures are clear

General Matters

- 1 The Committee must be made aware, at the planning stage, of all events, outside the usual scope of the group, as the Committee, as Trustees, have responsibility for the safe and proper running of our u3a. Where groups have been formed, with Committee approval, whose sole purpose is to arrange and organise outings or trips (for example Gig Buddies; and walking groups etc) individual approval by the Committee is not required for outings of a day or less.
- 2 Informal events, including concerts, meals out, theatre trips and even holidays (“I’m going – you can come too”) are becoming increasingly popular amongst L&M u3a members either as part of a group’s normal activity or as an extension of it. These events are in effect u3a members coordinating their own individual events and trips and for which they are individually fully responsible. Nevertheless, as these events are arranged using the L&M u3a publicity channels it is important that they fit with the objectives and policies of the u3a and the Committee should be informed via the Groups Co-ordinator, as appropriate, of the activities taking place. The overarching u3a insurance policy noted below should still apply but it is recommended that attendees should be advised to consider taking their own insurance cover as appropriate.
- 3 The Organiser(s) of each formal event is responsible for:

- Budgeting and costing the event and ensuring they have the approval of the Treasurer or Committee as appropriate, before making all necessary bookings for transport, venues, and accommodation. This includes checking the cancellation and refund policies of any providers at the beginning of planning a trip or event and informing the Assistant Treasurer or Treasurer of these.
 - Ensuring the event is publicised in good time with deadlines set. For all Interest Group events, this must be initially to Group members only whilst ensuring that there will be sufficient time thereafter to advertise to the full membership if needed.
 - Putting arrangements in place in conjunction with the assistant treasurer, to ensure that money collected is credited to the u3a No.2 bank account or passed to the Treasurer for banking before payment to a third-party venue or travel provider is required.
- 4 When the committee agrees to any trip it will record that it acknowledges that the individual member(s) who are named and authorised by the L&M u3a committee to organise the trip are acting on behalf of the L&M u3a.
- 5 Members of Lancaster and Morecambe u3a should be given priority to attend any event, and the following priority order is recommended:
- the Group members (if it is a Group specific event),
 - L&M u3a members
 - other u3a members
 - and, only if places remain, non-members attending a public event.
- (Non- members may not join a trip or holiday because of the limitations of Third Age Trust insurance provisions.)**

Carers/companions should always be accommodated as appropriate but must pay for their place.

The allocation of places should always be as transparent and open as possible.

It should be made clear to Attendees as part of the Terms and Conditions of booking that Payments are not refundable unless:

- the place can be filled from a waiting list; or
- the Event/Trip is cancelled before payment to the venue (excluding any non-refundable deposits), or
- the venue cancels and offers refunds.

Allocation of such available places from the waiting list should be decided by the Organiser.

Financial Matters (Formal Events Only)

- 6 All these events fall within our Charitable remit and income and expenditure must be reported to the Charity Commissioners annually. However, for ease of operation these

events will be dealt with through a separate Bank Account and cheques need to be made payable to L & M u3a No 2 Account.

- 7 Each Event or Trip should be budgeted to break even or make a small surplus. To achieve this an appropriate contingency must be built into the cost per person by assuming that a coach will not be full or that not all places on a holiday will be booked. It is possible however that even with this contingency some events or trips might make a deficit due to unforeseen circumstances.
- 8 If free places or other discounts are offered for group bookings the savings should be divided equally between the participants.
- 9 Surpluses from authorised trips and events belong to the Lancaster and Morecambe u3a and will not be carried forward. Deficits from authorised trips and events are the responsibility of, and will be paid for by, the Lancaster and Morecambe u3a.
- 10 No multiday holiday booking will be given final confirmation unless all members booked to go on the holiday (or their substitute members) have paid in full for their individual share(s) of the whole costs of the holiday and payments totalling the whole costs of the holiday have been received by the organiser(s).
- 11 **Booking forms must include the statement "*Monies can only be refunded if you can be replaced by another attendee, or a refund is received from the venue/operator. You are therefore strongly advised to take out travel insurance to cover you for any unforeseen circumstances.*"**
- 12 Members should be advised to expect the above ruling to be applied in all cases.
- 13 Incidental costs such as tips, group meals, tours, activities, or entertainments should be included in the cost per person. The money will be paid into the No.2 account and made available to reimburse the u3a member appointed to manage the trip/holiday.

Accessibility

- 14 Members with special needs (for example, motor, sensory or memory difficulties) are welcome to participate in any appropriate activity, trip, and event. However, not all activities, trips, events or venues will be suitable for all members.

Organisers should aim to provide members with information about accessibility at the activities, trips, events and venues.

Members must take reasonable steps to safeguard their own welfare.

If a member requires a carer, the carer is welcome to accompany the member. This must be arranged by the member concerned. Group leaders, organisers and other members cannot act as carers.

Insurance

- 15 The Third Age Trust organises public liability insurance in respect of its members and L&M u3a benefits from these arrangements. All day and multi day trips, whether organised 'formally or informally' are covered by a 'commercial combined policy' which provides public liability cover.

It is important that Attendees are informed that this insurance cover is not a replacement for travel insurance nor a personal accident/injury policy. Attendees should be strongly advised to take out their own insurance cover prior to travel.

Some major venues are now asking groups to provide a cover note so that they can check that the policy is current. A copy of this can be found in the Members area of the Third Age Trust web site - Documents – Insurance

If the basic procedures outlined above are followed, then u3a liability insurance should cover all such Special Educational Activities in the UK and Europe, both with respect to third party liability and member to member cover. If you wish to extend an invitation to members of other u3as that is fine. Non-members should be covered in the same way provided that their attendance is not a regular event.

Use of Private Cars

- 16 Use of private cars (see FAQs on L&M u3a website for any further information <https://u3asites.org.uk/lancaster-morecambe/page/126597>)

You are not automatically insured when using your own car for a u3a activity, you will need to check this with your own car insurer.

Members of u3a can offer lifts to other members and accept money towards petrol costs without compromising their car insurance policy but it is recommended that this is done as an informal arrangement between members.

This policy and guidance combines, updates and replaces the previous L&M u3a policy and guidance in the documents titled: "Organising events outside of normal Group Meetings and Special Educational Activities Policy"

Fully revised and approved by the Committee 11 December 2023