

Eastleigh District u3a Events and Activities Policy

All activities whether organised by an individual or a small sub-committee should be approved in line with the Eastleigh District u3a Constitution and have the permission of the committee in advance of the activity. The policies will lay out what, if any, contracts or agreements must be signed by a Trustee. All financial arrangements must be overseen by the Treasurer on behalf of the committee.

The committee takes a pragmatic approach when making decisions on these matters herein on a one-to-one basis. We encourage potential new members to sample what we have to offer in retirement and to spread the word to family and friends.

Our Constitution gives us such powers to organise, promote, participate in and/or run conferences, lectures, seminars, courses and educational events; associate and collaborate with other u3as and groupings of u3as and the Third Age Trust in any way. All in the furtherance of our charitable purposes.

No u3a member should benefit from any discount (e.g. a free place) offered by the organisation providing the event. The value of free places is shared amongst all participants to the event. Normal out-of-pocket expenses can be paid to an organiser out of the money collected for the event. As all u3a members offer their services free to the movement, the organiser(s) should not receive any financial reward.

A members' carer (who may not be a u3a member) may attend Day Trips, Interest groups and Holidays to provide care and assistance to that member.

There are three types of activities that are considered here together with Interest groups:

1. Day Trips: travel only, open to all members of the U3A – covered by U3A insurance.
2. Study Group overnight trips: travel and accommodation, open to study group members only – covered by U3A insurance.
3. Holidays: open to all members of the U3A – no U3A insurance.

Interest groups / Activity groups

This policy includes here any trips and activities arranged within Interest groups and includes Study Trips (please see 2 Study Group overnight trips below).

A non-member may attend an Interest Group/Activity group with committee permission, providing it is as a taster before joining the u3a and not a regular occurrence for that person to do so.

Eastleigh District u3a operates Reciprocal Agreements with other local u3as. Such agreements allow a u3a member to join an Interest group (not available at his/her u3a) in a neighbouring u3a without the need for joining the host u3a. It is limited to joining one group only and when the host group becomes full this visitor must give way if a member from the host u3a wishes to take his/her place.

Furthermore we are extending sharing of activities, events, holidays, day trips and Interest groups at Southampton Network of u3as promoting a culture of sharing to the benefit of all in this grouping.

1 Day trips

On 1 July 2018 the Package Travel and Linked Travel Arrangements Regulations 2018 (the Regulations) came into force, affecting trips and Linked Travel Arrangements, u3as as not-for-profit organisations, are exempt from the Regulations providing:

- Packages and linked travel arrangements cover a period of less than 24 hours. Where overnight accommodation is included this will be a linked package and hence covered.
- Packages offered, and linked travel arrangements facilitated, are occasionally, on a not-for-profit basis and only offered to members.

The Trust has advised u3as that 'occasionally' should be not more than 10 times a year and we endorse this arrangement in this policy here.

A non-member may attend a day trip with committee permission, providing it is as a taster before joining the U3A and not a regular occurrence for that person to do so.

Members should have their own personal travel insurance cover where appropriate.

When u3a members make their own way to venues (theatres, cinemas, other events) and pay their own entrance costs these are not included in this policy.

For clarity when EDu3a arranges a trip which includes, for example, the transport and ticket price, and the transactions are routed through our bank account, then they must be included in the financial accounts.

The organiser will arrange a trip and agree with the Treasurer the payment arrangements and the 'sales' price usually including a small mark-up as a contingency.

When organising day events or overnight trips, care should be taken in making any prepayments, as there is no insurance provided to protect you should the supplier go out of business. However, using a credit card for these purposes does offer some protection.

2 Study group trips

The organiser for study group trips may be the Group Leader or other nominated member, with the process similar to that detailed above for day trips, except that accommodation will be required and included in the price. In order to protect the person arranging such trips, the Third Age Trust has arranged tour operator liability insurance. This insurance only applies to the organisation of study group trips, not holidays.

If any discounts are offered for group bookings for either day trips or study group trips these should be shared between all those attending. The groups' organiser should not attend events free as this could be seen as a benefit.

All monies paid in advance for study group travel should pass through the main U3A account as this is part of your core activity.

3 Holidays

As far as u3a holidays are concerned, the only safe way to organise them is through a travel agency/tour company so that you are fully covered by their liability insurance. A decision to organise a holiday ourselves could leave you personally liable in the event of a claim for any damage or accident that might occur as we would have no insurance to protect us. Therefore

payments are made on an individual basis, directly to the company and not to the u3a. The organiser should collect cheques and then forward them direct to the travel company.

Holidays should be booked and paid for by members directly with the tour operator. This would ensure that members benefit additionally from the insurance cover that may be provided by the tour operator.

Insurance related to trips and holidays.

As long as the basic procedures outlined above are followed, then the liability insurance the Third Age Trust provides will cover our day events and our study group overnight trips in the UK and Europe, both with respect to third party liability, our group organiser and member to member cover. It must be clearly understood, however, that it does not include personal accident/injury or travel insurance, both of which are the personal responsibility of each u3a member to take out.

In the interests of sharing, we will extend an invitation to members of other u3as to join us for Day trips and Holidays in circumstances where we have unsold tickets or when this is a joint event across the Southampton Network.

We will also accept a non-member to attend a day event or an Interest group activity, with committee permission, providing it is as a taster before joining the u3a and not a regular occurrence for that person to do so.

In the case of a holiday, the Third Age Trust does not provide any insurance cover so personal travel insurance is essential. With committee approval it is agreeable to include partners and friends of members to attend. However, care should be taken here to include members in the first instance. For holidays where the monies are paid by members direct to the travel company then the monies do not need to pass through the bank account.

Cancellations

If a potential attendee cancels with sufficient time, it may be possible to refund some of the cost although most likely not the deposit. However, the organiser should endeavour to find a replacement.

Eastleigh District u3a will keep a record of the visiting person/member. Details such as a Name, email/telephone number and Next of kin (required for certain activities) will be requested and compliant with GDPR.

This policy was agreed by Eastleigh District U3A Committee on 13th November 2023

Signed: Tony Lovell

EDu3a Chairman

Review - 2025