

Greater Thame U3A – Checklist for Visits

<p>Name of trip:</p> <p>Name of trip leader:</p>	<p>Trip date:</p>
<p>CHECK</p>	<p>Date and appropriate information</p>
<p>1. Plan visit if possible 3 months in advance. Contact the Visits Co-ordinator to check that your visit doesn't clash with anyone else's.</p>	
<p>2. Book Venue/venues. Check for disabled access and availability of buggies etc.</p>	
<p>3. Reserve/book coach for chosen date; coaches are available from 16 to 51 seats. Plan for a comfort break if a long distance.</p>	
<p>4. Inform the Visits Co-ordinator that you have now booked the trip and also let the Treasurer know to expect requests for cheques.</p>	
<p>5. Work out trip costs – coach, entrance fees, lunch? Add driver's gratuity £1 pp.</p>	
<p>6. Are there group concessions, free passes i.e., NT, RHS. See guidelines at the end of this document.</p>	
<p>7. Keep copies of booking forms. Note when payments are needed for coach and venues. You will need to ask for cheques from the treasurer in plenty of time.</p>	
<p>8. Arrange pick up points and time that the coach will be leaving.</p>	
<p>9. Time coming back & expected time of arrival in Thame.</p>	
<p>10. Finalise costs per person – see 5</p>	

<p>11. Make sign up/payment sheet containing the following: -</p> <p>a) name.</p> <p>b) phone no.</p> <p>c) emergency contact no.</p> <p>d) member of NT etc if applicable.</p> <p>e) payment received column</p> <p>f) pickup point if more than one.</p> <p>See example attached</p>	
<p>12. Publicise the trip at Group Meeting, Main Meeting and in the Newsletter also on website if appropriate.</p>	
<p>13. State closing date for payment. A person cannot go if they have not paid in advance (at least a month before the trip).</p>	
<p>14. Payments from members should be made by cheques made payable to “Greater Thame U3A”, with name of trip and group on back. Payment can also be made by BACS – email treasurer@gtu3a.me.uk for details.</p>	
<p>15. Give cheques to treasurer as soon as possible using the provided Payments to Treasurer form. Keep a copy for your own records.</p>	
<p>16. Once paid money cannot be refunded as the cost of the trip is calculated on number of people going</p>	
<p>17. Month before visit check you have all payments. If not contact all who have not paid and ask for immediate payment.</p>	
<p>18. Let treasurer know what cheques you need. All payments must be made by a U3A cheque. DO NOT LEAVE TO THE LAST MINUTE</p>	

19 Pay coach company and venue by letting the Treasurer have the relevant invoices as soon as possible.	
20 Check advice from venue(s) regarding coach parking, reception etc.	
21. Week before visit check right date & pick up points with the coach company	
22. If the trip is going to make a profit of more than £1 per attendee then contact the Treasurer for the appropriate amount of cash so that a refund per person can be made on the coach	
23. Day of visit leave a list of emergency contact nos. for all those on the trip with a member of the U3A not on trip. Remember to notify this person at the end of the trip that all is well.	
24 Take with you copies of booking forms, emergency list, advice from venue(s), and pickup lists. Take your mobile phone, fully charged, with you. Make sure that you have cash for the driver's gratuity.	
25. At each pickup point there should be someone who has a list of those boarding and checks them off, their telephone nos and, also, the trip leader's mobile no.	
26. Check names and count numbers on coach after final pickup and then check numbers after every stop.	
27. Day of visit hand out itinerary, or announce itinerary on the coach and give everyone your mobile no. At start of trip, after last pickup ask the driver to give the safety talk.	
28. Give driver gratuity on arrival home.	
29. After the trip do your final account and give this to the Treasurer.	

Greater Thame U3A

Guidance on planning a day trip for Greater Thame U3A

The committee of Greater Thame U3A want trips organised by our members to be as stress free as possible for both trip leaders and participants. Therefore, we have tightened up our procedures to help you as much as possible. We ask for your co-operation in reading these guidance notes, filling in the check sheet and keeping accounts. Thank you.

- Visits Co-ordinator: Joan Reid email greater.thame@gmail.com
- Treasurer: Raymond Powell email treasurer@gtu3a.me.uk
- The form that accompanies this guidance sheet should be filled in as you complete each section. Note any appropriate information in answer to questions e.g., which coach company have you booked etc. The form should be returned to the Visits' Co-ordinator after the visit.
- **Free Places** Our committee has decided that, in line with Third Age Trust recommendations, free places offered by coach companies or venues should not be taken up by trip leaders for their own use, but the savings made should be distributed amongst the whole group. This is the fairest way.
- Even when people have signed up for a trip, they cannot be considered to have booked until they have paid. People sometimes forget they have signed up. This is why you should make sure you have the payments in, at least a month before the trip, preferably sooner.
- Money for trips, once paid, is **non-refundable** unless the person dropping out can resell the place or the leader has a waiting list and can offer the place to someone else. **It is not the responsibility of the leader to resell the place if there is no waiting list.**
- If the trip is going to make a profit, consider giving those on the trip a refund as trips must not make a large profit. The profit **cannot** be considered as a buffer for the next trip.
- Please ensure that the trip sign-up sheet is destroyed after the final details have been sent to the Treasurer to comply with the U3A GDPR policy.