



Procedure for Organising and Costing a Coach Trip

Do not be put off by what may look a lengthy set of instructions because it is largely common sense actions, most of which you would carry out anyway. It is just to offer you support, make your life easier by ensuring you don't forget something, and to standardise financial and operating procedures.

Planning and Publicity

Contact the Interest Group Coordinator via contact page on web site to inform them of your intentions; venue, provisional date etc. Try to do this 4 or 5 month before the day of the trip.

Try to choose the months of April to September when there is more light for your visit and members can travel home from the drop-off point in the light. Where possible, keep to destinations within two-and-a half-hours travel time.

Once the date and cost are confirmed:

- Let the Website Administrator have the details for the Events page of the website. This should include the cost and booking arrangements i.e. when you are going to start taking bookings.
- Create a notice for the weekly newsletter and email it to the editor stating when you want it to appear i.e. for the next 4 weeks.

Obtain Travel Quotes

We generally use Coastal Coaches, there are other reputable operators from whom you may want to obtain a price.

If you are just travelling to a Town or City e.g. Shrewsbury or Liverpool, arrangements and costings will be relatively straightforward. You will need to tell the coach operator:

- Your name and that you are arranging a trip on behalf of Preston and District u3a.
- Size of coach required, the larger the coach, generally the cheaper it works out per person. Can you fill a 51 seater? If you are a Group Leader arranging a visit for your Group of 17 people, can you get an additional 32 from the general pool of members?
- The destination, the pick-up point, time setting-off and time returning from destination.
- Example - requiring a 51 seater coach, travelling to Shrewsbury on Saturday 12th. July. Setting off from (usually Lancaster Road near the top of Preston Market) at 9am, leaving Shrewsbury at 5pm.
- Ask for an estimated journey time.

- When you get a price e.g. £650, divide the cost by the number of travellers you are expecting minus 6. For a 51 seater = $\text{£}650/45 = \text{£}14.40$.
- Decide to charge £14.50 per person – this represents very good value for money and will still be much cheaper than going on a pre-arranged trip and will allow you to afford to go without quite filling the coach.

Ask the Coach Operator

- Coastal Coaches do not require a deposit. If the Company you are using does, do not under any circumstances pay this yourself with the intention of claiming it back. Contact the Treasurer to arrange payment of the deposit.
- Ask if we can pay by Bank Transfer? If yes, ask them to email you with their bank details. These will need to be passed to the Treasurer later.
- If they don't accept bank transfer and require a cheque, ask to whom the cheque should be payable?
- Ask them to email an invoice to the Treasurer showing any deposit received and date the balance is required.

Contact the Venue

If you are going to a particular attraction e.g. Safari Park or Historic House then contact the attraction to confirm:

- Number of people in Party (don't forget to say they are Seniors)
- Time of arrival.
- Is there a group discount, and/or senior rates?
- Make sure there are no hidden extras.

If they can't allow a visit on that date, then change the date and get back to the Coach Company with new date. The price is likely to be the same.

Work out the costings for the trip

If the coach fare for a 51-seater coach is £480 = $480/45 = \text{£}10.60$, rounded up to nearest £0.50 ask £11.00. To this add the cost per person for entry to the attraction, e.g. £9. This will make the total cost per person = $\text{£}11.00 + \text{£}9.00 = \text{£}20.00$.

NOTE: If you are visiting a National Trust property or English Heritage property etc. When taking bookings ask the person making the booking if they are members of the property you are visiting. If they are they only need to pay for the coach. Advise them they must take a current membership card with them to show at the venue on the day.

Booking Members on your Trip

Make sure you have a Receipt Book with a carbon page for duplication. Complete a receipt for any payment received (record whether cheque or cash). This is vital for audit purposes. (Members sometimes go on so many trips they can forget whether they've paid). Those paying by cheque should make their cheque payable to **Preston and District u3a**.

Have a pre-printed list on which members can PRINT their name and contact phone number for day of trip and if they are members of the property you are visiting Y/N.

Also have a column to tick when they have paid. For telephone bookings arrange for them to send a cheque and make sure you make out a receipt once it arrives.

From the list of members identify one who will act as your nominated assistant and who can take over if necessary (see also section on Accidents).

If it looks like you might not fill the trip you can take members' relatives etc. but make sure you have their name and know the member to whom they are attached. This must only be a one-off. As per TAT if they are going to go on one or more trips they must become a member.

PLEASE NOTE – Insurance cover provided by the Third Age Trust is for u3a Members only, and should a non-member wish to come on the trip, in the event of an accident they might find themselves without liability cover.

Keep filling up the coach and, if possible, start a waiting list. If people who have paid have to cancel and their place is filled by someone on the waiting list, they can have their money refunded (provided they sign to confirm their money has been refunded).

About a Month Before

See if you can obtain any Tourist Information, Brochures or Guides to help Members find their way about/get more enjoyment from the day.

About Ten Days Before

Confirm the Treasurer has paid the full balance required by the coach.

If you need a cheque for the attraction you are visiting, ask the Treasurer for a cheque. Ensure the cheque has two signatures on it when you receive it.

Make sure all those on the trip have your mobile number in case they need to contact you on the morning of the trip. For example: there could be a last minute illness, or they need to tell you they are running a bit late.

The Day Before

Email a list of members booked on the trip to two members of the Committee who are not going on the trip. This is in case of accidents; we will then know who should have been on the coach.

On The Morning

Make sure you have the cheque to pay for any entry fees. If fewer members turn up, then only pay for those who are present. This means that those who do not turn up would still have to pay for the coach but could have their entry money refunded.

Be at the Pick-up Point about 20-30 minutes before set-off time.

Have a clip-board with your full list of Members going on the trip together with their contact numbers for the day and tick off members as they arrive.

When the coach arrives, talk to the driver, get on and reserve front seat for yourself.

Five minutes before you depart, ring anyone who has not turned up. Wait 10 minutes for any stragglers but no more, it is not fair to the others.

As soon as you set-off, email or ring the same two members of the Committee who had your list of names to advise of any changes in personnel on the coach.

When you reach the destination

Make sure everyone knows WHERE and at WHAT TIME the coach will pick them up.

Try to make sure nobody is on their own (unless they specifically wish to be) and that people are going around in pairs or Groups.

Make sure they all have your mobile contact number for the day, in case they get lost or have an accident or are going to be slightly late back to the meeting place for the coach.

Tick off members as they get on to the coach; wait up to 30 minutes for any stragglers.

Accidents/Emergencies

In the event of any accidents you should offer reassurance and make sure the person receives/has received medical attention or is/has been collected by an ambulance. You may want to see/find out if there is a friend who will go/has gone with them. It is not your duty to go with them, you have a duty to the remaining passengers to see that they return safely. In the event of the organiser or their partner suffering a medical emergency and needing treatment responsibility for the return journey is delegated to the nominated assistant. The Coach Driver should be informed.

Log any accidents/medical problems and complete an Incident Form on your return.

On The Way Back

You may want to carry out a collection for the driver.

After the Trip

Arrange to pass any cheques, cash and/or receipts from the attraction visited to the Treasurer together with a simple statement of money collected and spent. Highlight any deficit or surplus.

Advice

Once you have organised one trip – the procedure is very straight-forward and you can always get advice at any stage.

Policy date July 2022
Revision due July 2025