

GUIDANCE FOR ORGANISING OUTINGS

These provisions have been adopted by the U3A Committee in November 2019 to support organisers in arranging a programme of Outings. The Organiser(s) take the lead role in arranging the outing but nevertheless members of the Committee will assist as described below.

The provisions will be subject to review by the Committee from time to time.

The Organiser(s) is/are those individuals appointed by Committee to arrange visits on behalf of Stourbridge U3A. The role of the organiser(s) is/are described in the following paragraphs.

Where this guidance note does not fully cover the requirements for a specific venue then the Organiser(s) and, in the first instance, the Treasurer on behalf of the Committee will agree appropriate arrangements.

1. Check with venue:
 - a. Facilities – opening dates and times, time needed for visit, catering availability and picnic areas, coach parking, accessibility, disabled access and provision.
 - b. Costs of admission to the property and any optional facilities including any group arrangements and/or concessions.
 - c. Whether the selected date of visit is suitable or whether an alternative date can be arranged.
2. Coach booking

Good practice suggests that U3A should obtain three competitive quotations from coach operators. However in selecting the preferred operator factors to be taken into account are not only price but also coach availability and flexible cancellation fee terms. The preferred operator will represent overall value for money and not

necessarily the cheapest quote. Quotes from coach operators should be obtained bi-annually.

3. Coach booking through the selected operator

- a. Date and times, travel time needed and time for visit, enquire and confirm driver's hours.
- b. Agree departure and return point, with time. (Please see Annex 1 regarding additional guidance). Confirm booking in writing to the coach operator to include all details of the outing. Approximately one week before the outing, contact Coach Operator to confirm final details.
- c. Request that the Treasurer sends a cheque by post to the coach operator to arrive within the terms of the contract. If the operator is satisfied with receiving payment on the day of the outing, the organiser is responsible for obtaining the cheque from the treasurer in good time.
- d. If due to lack of bookings, a smaller coach would be appropriate, the operator might be able to provide this and make a small reduction in the charge.
- e. A week before the Outing, email all passengers with an itinerary for the day and include a request that all passengers must ensure they have a current emergency contact for that day in their purse or wallet in the event of breakdown, delay, illness or accident. Advise passengers of the Organiser's mobile number for use for emergency only on the day of travel.

4. Costing the outing

The organiser should estimate the likely number of places to be taken up on the trip. This will depend on various factors including availability of tickets for entry to any event, level of interest in the subject matter, attendees at previous similar outings.

The cost will generally include entry. This may not be the case for National Trust properties etc where some attendees will not be liable to entry fee.

One inclusive cost to include all expenses is shown on the hand-out leaflet.

Note the basis for costing is that trips should break even. Any surplus will be carried forward to cover any future shortfalls.

5. Publicity

Good publicity is essential to ensure that outings are well supported.

The Organiser should:

- a. Prepare posters to be displayed at meetings.

- b. Ask the Chair to make appropriate announcements at the Monthly meetings and try to give advance notice in the Newsletter if time permits.
- c. Circulate details to all who have email facilities.
- d. Arrange to post trip details on the website.

6. Ticket Sales

Arrange ticket sales in the Hall at the monthly meeting(s) and invite members who do not attend Monthly meetings to book with the Organiser by telephone or e-mail and arrange to transmit payment by cash or cheque made payable to "Stourbridge U3A" to the Organiser before booking is confirmed. Tickets are for sale to adults only as children are not covered by our Insurance.

- a. Organiser gives receipt in the form of a printed ticket when payment is made (see Model copy in Annex 2) and reserves appropriate number of seats on the coach and places for the event.
 - b. Organiser passes cash/cheque to the Treasurer as soon as practicable.
 - c. Process bookings made/requested between meetings.
 - d. It is useful to record the bookings on the type of form shown as Annex 3.
7. Monitor bookings and 4 weeks prior to Outing alert the Committee for the need to either cancel the Outing or continue with a possible small loss of funds to avoid disappointing and deterring members already booked. NOTE: as an alternative, unallocated seats might be offered to other U3A Groups.
8. Within the terms of contract with the coach operator request Treasurer:
- a. to provide a cheque for the coach operator.
 - b. to provide the Organiser with the driver gratuity of £30 cash for payment on return from the outing.
9. Two or three working days prior to the visit, telephone the coach operator to confirm that the coach is booked and time and place of arrival is noted.
10. The Organiser arrives at the departure point on day of outing at least 20 minutes before planned departure time. The Organiser meets the driver and checks any requirements, including awareness of the itinerary and the departure time, books in the Members and assists the Members in finding suitable seats.

11. When all passengers have boarded and are safely and comfortably seated, the Organiser advises the driver the passengers are ready to depart. The Organiser will recognise that it is unreasonable to delay the departure for any passengers who arrive late but it might be appropriate to allow no more than 5 minutes for any unexpected delay.
12. Members must ensure they have a current emergency contact for that day in their purse or wallet in the event of breakdown, delay, illness or accident.
Organiser to give their mobile number to passengers for contact on the day.
13. On arrival at the venue, the Organiser pays the entry fee for the venue or balance if a deposit has been paid and collects the tickets. Any instructions and times for meeting/departure are clearly given to all attendees.
14. Immediately before departure from the venue, ensure all passengers have returned to the coach and are safely seated before advising the driver that the coach may depart.
15. Thank the driver on return to the departure point and hand over the gratuity. The £30 gratuity should be reviewed annually.

ANNEX 1 – ADDITIONAL GUIDANCE FOR ORGANISERS

Stourbridge U3A Committee has approved the following guidance should be met in organising group outings:

1. Seats are not allocated without payment in full by cash or cheque. Refunds are not usually given unless places are sold to other members. If the organiser is given 48 hours notice of cancellation, a refund may be made for costs not incurred e.g admission to venue or refreshments. Members might at their discretion pass bookings they are unable to use to other Members provided the Organiser is advised of the change.
2. Bookings are only available to U3A Members. Non member visitors may take up places not filled by members. For monitoring and insurance purposes, non members may only attend up to a maximum of three Stourbridge U3A events (monthly meeting, interest group or social activity/outing) in any one membership year. This requirement is essential as otherwise insurance might be invalidated for the whole group.
3. Carers who attend with members will pay for the coach and entry fees, but do not pay the visitor fee. There is no restriction on the number of events/outings which a carer may attend in any year.
 - i. Previous experience indicates that members make bookings at Monthly meetings and can also make bookings between meetings by personal contact with the Organiser or by post and collection of booking confirmation at the next Monthly meeting. **Telephone or email bookings are provisional only until payment is received in full.**
 - ii. It is advisable to leave at least 2 rows of front seats across the coach for the Organiser(s) and for Members having mobility problems.
 - iii. One departure point eases administration and helps to avoid intending passengers being left behind. Members often request suitable car parking at the departure point and the Stanley Road car park might best meet these requirements.
 - iv. Members have inferred they prefer to avoid a return time later than around 6 pm, although this is not always possible if there is a longer distance to travel or more time is needed for the visit.
 - v. Organisers or Committee members should try to ensure that new members are made to feel welcome, perhaps by asking solo travellers to sit beside them.
 - vi. A small first aid kit is available and should be taken on the outing in case required to meet Health and Safety requirements.

ANNEX 2 – MODEL FOR PREPARATION OF POSTER

Insert destination

Insert day and date and year

Stourbridge U3A have arranged an excursion to this *Insert brief description* situated approximately miles from *Insert*

Programme for the day:

am Depart from Stanley Road Car Park (near to rear entrance to Mary Stevens Park)

am Arrive at *Insert venue*

pm Depart from *Insert venue*

pm Approx – return to Stourbridge

Cost: £ per head to include coach fare and driver's gratuity.

Cheques made payable to "Stourbridge U3A" to be handed to the Organiser at Monthly Meeting. Telephone enquiries please contact the Organiser *Insert name* (telephone).

Members of the *insert* may be entitled to free entry with their Membership cards.

The website address for the venue is *insert*

NB. There is no insurance for personal accidents – this is members' own responsibility

ANNEX 3 - BOOKINGS FORM

EVENT/TRIP

COST : £

Name	Contact no	Date	£	Cash	Chq

ANNEX 4 – EVENTS AND OUTINGS FINANCIAL SUMMARY

Activity:

Date:

Organiser:

Estimated Cost:		£
Travel (inc driver's tip)		
Entrance Fee (1)		
Entrance Fee (2)		
Extras		
Total		
Expected number of attendees -	Total divided by no. attendees (to nearest 50p)	
Add £1 per member, £2 per visitor for final price		

Actual Income and Expenditure:				
Receipts			Expenditure	
Date	£	(chq or cash)	Detail	£
			Deposit travel	
			Balance travel	
			Driver gratuity	
			Entrance Fees (1) - deposit	
			Entrance Fees (1) - balance	
			Entrance Fees (2) - deposit	
			Entrance Fees (2) - balance	
			Food/refreshments	
			Publicity/Tickets	
			Extras	
Total income			Total expenditure	
Balance	£ profit/loss			

No. booked Members Visitors

No. attended Members Visitors

Refunds:		
Name	Amount £	Reason

Final balance:

Organiser.....

Treasurer.....

Date.....