

Guidelines for Organising a Trip

For Group Leaders and Individuals organising a trip of any size

1. Decide on a Trip

- A. Choose where you would like to go - look at coach company brochures/websites for ideas
- B. Decide on a venue, date and method of getting there – coach or by own car/car sharing.
- C. Contact the chosen venue and/or coach company for details including prices. Refer to end of Guidelines for a list of coach companies.

2. Check the date

Advise the Trips/Events Coordinator tripsevents.thorleyu3a@gmail.com of the following:

- A. The date of the trip - to make sure the date does not clash with another trip. The date will be listed in the U3A desk diary only (not on the website) until the date is confirmed.
- B. Details of the trip, location, etc.
- C. Advise if the trip is just for your own group or the trip is open to all Thorley U3A members. Organisers can then evaluate if there will be a clash – i.e. members may be in two groups.
- D. The name and contact details of the organiser – this is helpful in case a member cancels via the website.
- E. If the trip is cancelled.

3. Cost out your trip based on:

- A. Cost of the coach
- B. Entry cost to venue - there are often group prices available with refreshments/lunch included
- C. Include tip for driver
- D. Disbursement for any extras or last minute cancellations

NOTE: Payments for Day Trips and up to one U3A Holiday per year can normally be handled through Thorley U3A accounts. However, to ensure that our U3A's turnover remains under the VAT threshold, Holiday organisers are asked to first check the situation with our Treasurer treasurer.thorleyu3a@gmail.com

If Holiday payments would take us over the VAT threshold, members may be asked to pay the holiday company direct – and if members can pay for their trip directly with a credit card, this gives them additional protection if the agent cancels the trip.

4. Advertise your trip

- A. Produce a simple flyer giving as much detail about the trip as possible.
- B. Email the Trips Coordinator tripsevents.thorleyu3a@gmail.com who will:
 - arrange for details to be advertised on the Events page of the website.
 - forward to the Chair chair.thorleyu3a@gmail.com for inclusion in the monthly email Update to all members via Beacon.
- C. Bring the flyer along to the U3A monthly meeting for display on the Trips desk.
- D. You can also advertise the event yourself by adding it to the Thorley U3A Facebook page.

5. Bookings

- A. Use a Trips Register (see link on Events page of website). Paper copies are available from the Trips Coordinator on the Trips Desk at the monthly meeting.
- B. Use the register to gather names, contact details, emergency contact details, U3A membership number, cheques and monies paid in, etc.
- C. You are also strongly recommended to set up a Beacon Group to contact members taking part by email. For advice and help contact beacon.thorleyu3a@gmail.com. If you do not use Beacon to contact members, emails should be sent using BCC so that personal addresses are not revealed to other members.
- D. When taking bookings, priority should be given to Thorley U3A members.
- E. The first bookings to be taken at the monthly meeting. No bookings to be taken prior to the monthly meeting.
- F. Members to pay on the day of booking:
 - cash or cheques made out to Thorley U3A (but see the note under Item 3 above).
 - purchase a small receipt book and give the member a numbered receipt - keep the copy for your records.
- G. Those who cannot pay on the day of booking - put on a waiting list on a first-come basis:
 - ask for a cheque to be posted to your address.
 - places are not guaranteed until payment in full is made.
- H. If you cannot fill your trip, advise the Trips Coordinator tripsevents.thorleyu3a@gmail.com who will forward details of your trip to other local U3As on your behalf.
- I. When adding a member from another U3A to the booking list, ask and note down the name of their U3A.

6. Accounting (VERY IMPORTANT)

- A. **ASAP AFTER COLLECTION OF ANY MONEY** give cash and/or cheques to the Treasurer, using Form 10 (see link on Events page of website). NB: keep a copy for your own records. The Treasurer will give you a receipt.
- B. Ask the Coach company for an invoice, made out to Thorley U3A, and forward to the Treasurer, treasurer.thorleyu3a@gmail.com
- C. The Treasurer will write out a cheque or make a bank transfer to the coach company/venue as appropriate and when needed. Do not pay out of your own personal account. If the venue requires payment on the day, give the Treasurer a few days' notice, so they can provide you with a cheque or cash. NOTE: Currently there is a limit of £1,000 per day which can be made by electronic transfer from the Thorley U3A bank account. Larger payments must be made by cheque or multiple daily transfers.
- D. After the event complete Form 11 (see link on Events page of website). This is a Statement of Account which the Treasurer will need to pass to the external Auditor at the end of the year.

NOTE: If you do not have internet access, copies of the forms are available from the Trips Coordinator or any committee member.

7. Insurance

An Insurance Cover Note for the Third Age Trust and the Universities of the Third Age can be found on the Welcome page of our website. This insurance covers items such as Public Liability and Tour Operators Liability. However, it is **not** travel insurance and you must ensure that all members taking part in Thorley U3A holidays are covered by travel insurance. The U3A cannot insure the trip against cancellation or any losses incurred for any reason.

It is good practice to complete a Risk Assessment for any trip and there may be a requirement do so from the Third Age Trust insurers. Please contact chair.thorleyu3a@gmail.com for the latest information.

8. In the event of cancellation

- A. Money cannot be refunded unless the ticket is resold. The organiser may have a waiting list. If not, you can resell privately. NB: if resold privately, update the attendance list with the new name.
- B. Contact the Trips Coordinator tripsevents.thorleyu3a@gmail.com who will:
 - arrange for removal of info. from the website.
 - advise the Chair chair.thorleyu3a@gmail.com so that updates about cancelled trips can be made through the monthly Update emails to all members via Beacon.

9. Recommended Coach companies

The following is a list of coach companies that members of Thorley and other local U3As have used and recommended.

Lodge's	www.lodgecoaches.co.uk 01245 231262
Anita's	www.anitascoaches.com 01279 661551
St Margaret's Travel	www.stansted-airport-coach-hire.co.uk 01920 871280
Richmond Coaches	www.richmonds-coaches.co.uk 01763 848226
CoGo Travel	www.cogotravel.co.uk 01279 311020 Mobile: 07812 493015
Stort MiniBus Trust	www.bishopsstortford.org/community-buses 01279 712143
P&R Travel Minibus Hire	www.prhire.co.uk 01279 724318
City & Village Tours	www.cityandvillagetours.com 0845 812 5000

This company will organise a tour with a guide - you just have to organise the coach.

Trips/Event Coordinator Updated March 2021