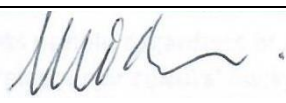


WADHURST U3A TRIPS AND EVENTS: A GUIDE FOR ORGANISERS

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NOTE: This document should be read in conjunction with POL2.1 (Wadhurst u3a Trips and Events: Guidance on Payment)

Introduction

Many members have already enjoyed a number of great excursions which we hope has made their membership even more enjoyable. These simple notes, collated from the experiences of Wadhurst U3A organisers - who have already been responsible for successful trips - are designed to help 'smooth the way', easing any possible anxieties.

Some of the suggestions are clearly not relevant to small trips where perhaps four or five members of a group decide to visit a local museum or gallery together, paying their own travel costs and admission charges. However, the guide can be adapted as necessary for larger excursions, providing a useful means of ensuring a hassle-free time for everyone.

Planning

Once an idea has been agreed, the group should appoint a main **Trip Organiser** for the excursion who can, and indeed often should, delegate specific tasks to at least **two other group members** to share the load and allow as many members as possible to enjoy the fun of organising a successful event.

Telling people

Trips are undoubtedly more successful if planned well ahead. As soon as the date, cost per person and details of the trip have been agreed, the Trip Organiser should tell the group as well as the following committee members:

- **THE WEBMASTER:** who will add details to the Wadhurst & District U3A website, a crucial way of communicating with the membership.
- **THE NEWSLETTER EDITOR:** who will ensure publicity about the trip appears in the earliest quarterly newsletter.
- **THE CHAIR:** who will include details in the notices at the monthly meetings.
- **THE TREASURER:** who needs to know when branch funds are being committed and appreciates advance warning of the need to issue cheques to external organisations and coach companies.
- **THE GROUPS CO-ORDINATOR** who will then add your event to the posters displayed at the monthly meetings.

Budget

Every group - and every visit - is expected to cover its own costs. This should apply to every event where charges are made. All trips should be budgeted to make a small surplus, say 5% of the total cost, to give a modest margin.

It is inevitable that these budgets can be compromised by reality, for example, an initial plan might be for say 12 members on a trip using a community minibus, but demand might lead to this being replaced with a 30 seat coach from one of the commercial companies. This can be accommodated but may lead to cost changes; this should be handled with care and sensitivity.

National Trust and English Heritage

Many of the trips arranged are to National Trust(NT) or English Heritage(EH) properties where admission fees are charged. It should be noted that quite a high proportion of our members are also NT and EH members which allows free admission. For these trips a two-tier charging system is inevitable. You should remind everyone to take their NT and EH membership cards in order to gain free admission and then charge separately for the non-NT/EH members.

Large parties can often arrange extra benefits such as tour guides and a private room for tea and biscuits on arrival. Costs for these should be ascertained beforehand and included in the budget where applicable. Whilst this is extra work, the feedback from members suggests these extras do provide 'added value' and are appreciated.

Key dates

When planning a trip or event, one key date is the **closing date** for bookings, this can be critical for coach bookings. However, two other dates are worthy of consideration.

While each group arranges trips and events for its own members, they may want to open the trip to other Wadhurst & District U3A members not in the special interest group. Similarly, we want to be an active participant in village life generally and so there should be no problem in opening any of trips to other local residents and/or friends and relatives where vacancies exist. It may be appropriate to set a date after which others may apply for any remaining spaces on the trip.

Signing people up

On the Wadhurst & District U3A website (www.wadhurstu3a.org.uk) there is a simple event booking form. Trip Organisers are strongly advised to ask each participant in a trip to complete one of these

forms. The following simple steps will considerably reduce the possibilities of any misunderstandings about bookings.

We suggest:

- Organiser asks each participant to complete a standard booking form.
- The organiser keeps all the forms and collates the monies received to forward to the Treasurer, as appropriate.
- If payment is by cheque, the event name should be written on the reverse of the cheque.
- At convenient times, the **Trip Organiser** should pass the funds with a list of details to the Treasurer, all that is required is a list of who has paid how much and whether by cash or cheque.

Bookings

When planning a trip it is inevitable that enquiries will be made to different coach suppliers, please be aware that what you consider to be merely a provisional request for information may be misunderstood and taken as a firm booking.

Care must be taken when making final bookings, particularly when numbers change and different coaches are required. Please confirm all enquiries, bookings and amendments by email or letter. This may be time-consuming but is absolutely vital to ensure there is absolute clarity on the status of any bookings.

Payments

All non-trivial payments will be made by cheque from the u3a branch account by the Treasurer. We use a system of two signatories on each cheque and so this may take 2 or 3 days to arrange. Please do try to allow seven days for a signed cheque wherever possible.

Some suppliers, for example coach companies, require payment several days in advance of the actual trip or visit, so again it is important to plan ahead.

Invoices or receipts should be supplied.

After the Event

After a successful event it really would be helpful if the Trip Organiser (and/or one of the participants) writes a brief report for the Newsletter and Website, including at least one picture. Publicity like this can help recruit new members and stimulate support for other excursions.

If, as an organiser, you have any valuable tips or encounter any unexpected problems from a trip, please try to pass these on so that other organisers can benefit from your experience.