

### 1.0 Introduction

1.1 The following guidance notes apply to

- a) Group Co-ordinators wishing to organise one-day outings and longer trips for their Interest Group or Study Group,
- b) and to organisers of one-day outings and longer trips for the wider Barnet u3a membership.

1.2 All such Travel Organisers are volunteers and must never derive any financial benefit from being a volunteer and must notify Barnet u3a of any gifts received whilst in role.

1.3 Although one member of the team should retain the role of leader, it is strongly recommended that the role of Travel Organiser is shared amongst a team of volunteers with specific roles allocated to each team member (see Appendix B for brief descriptions for possible roles).

### 2.0 General

2.1 All activities, whether organised by an individual or by a small team should be approved in advance by the Barnet u3a committee and where there are any contracts or agreements they must be signed by a trustee on the committee on behalf and in the name of Barnet u3a.

### 3.0 Responsibilities

3.1 As noted in 1.3 above it is strongly recommended that the role of Travel Organiser is shared amongst a team of volunteers.

3.2 It is particularly important to have clearly defined roles on the day of an outing or whilst on longer trips. Not all members of this team will participate in any particular trip, and it will be important to identify a member of the team to take the lead on each trip.

3.3 The Travel Organiser must ensure they know what responsibilities the external companies (coach company, travel company, etc) have and what is expected of the Barnet u3a volunteers. It is for the Travel Organiser to decide whether to use the services of a travel company representative on trips and share this cost amongst the participants, or to save this cost and take on the equivalent role themselves or as a team.

3.4 Agree waiting times with the coach company or other transport providers and make these clear to all participants. Do not put the enjoyment of a trip at risk to the majority of participants because of failure by one or a small number of participants.

### 4.0 Risk assessment

4.1 The Travel Organiser must carry out a risk assessment for each one-day outing and longer trip. Third Age Trust (TAT) have the following risk assessment forms for use as templates:

- a) Day trip risk assessment checklist

b) Holiday travel risk assessment checklist

4.2 On the longer trips where there is travel company involvement it would be normal for them to carry out their own risk assessment and the Travel Organiser can limit their own risk assessment to areas not covered by the travel company.

### **5.0 Financial Management**

5.1 The Travel Organiser must ensure that every effort is made to make each travel event self-financing. This must be achieved by preparing a budget for each travel event based on a reasonable estimate of number of members participating and all anticipated costs.

5.2 Depending on the type of travel event, different financial management procedures will be required:

a) No travel company involvement - typically a one-day outing might involve separate bookings for coach travel, venue entrance fees, refreshments, etc. Short trips might also involve overnight accommodation.

b) Travel company involvement - typically a longer trip of several days should involve bookings made by members direct with a travel company that will include most expenses.

5.3 Where there is no travel company involvement the Travel Organiser must agree the budget with Barnet u3a's treasurer and agree how expenses are to be paid and receipts collected. All payments by participants (in advance) must be paid into the Barnet u3a account. If any elements of the travel event attract free or discounted places based on certain numbers of participants, these are to be used to discount the cost to all participants – the Travel Organiser and their team are expected to pay the same as all other participants. Care must be taken in making any prepayments as there is no insurance provided to protect you should the supplier go out of business.

5.4 On the longer trips where there is travel company involvement it is expected that each participant pays for the trip direct to the travel company. If the travel company offers free or discounted places based on certain numbers of participants, these are to be used to discount the cost to all participants – the Travel Organiser and their team are expected to pay the same as all other participants. However, it is recognised that the Travel Organiser will have some expenses incurred in organising such trips and rather than claim these back from Barnet u3a, can use up to the value of one free place to cover these expenses including paying for certain elements of the trip excluded by the travel company, e.g. drivers tip.

5.5 Although every effort must be made to make each travel event self-financing it is recognised that a shortfall or surplus can occur. These will be paid out of, or paid in to, Barnet u3a funds.

### **6.0 Insurance**

- 6.1 The Third Age Trust (TAT) provide Public Liability insurance for all u3a members and organisers but they do not provide personal accident/injury insurance or travel insurance for individual members.
- 6.2 Travel Organisers must advise all participants to have their own personal accident/injury insurance and insist on them taking out their own travel insurance for overseas trips.
- 6.3 In the case of Study Group trips that involve overnight accommodation but do not have travel company involvement, TAT provide “Tour Operator Liability Insurance”. This insurance only applies to the organisation of study group trips, not holidays.
- 6.4 Details of the insurance policies maintained by TAT, together with answers to frequently asked questions, can be found in Appendix A or more fully at <https://www.u3a.org.uk/advice/insurance-and-safety>.
- 6.5 Particular care needs to be exercised if motor vehicles are to be hired or members’ cars used. Check the exclusions of cover under the TAT insurance policies (see above).

### **7.0 Accident and emergency procedures**

- 7.1 In the event of an accident or other emergency the Travel Organiser should call the emergency services.
- 7.2 First aid can be administered by any member and the TAT’s insurance will cover those members administering first aid.
- 7.3 The Travel Organiser must carry a list of “In Case of Emergency” (ICE) contacts numbers where these have been provided by the members.

### **8.0 Health and medication**

- 8.1 When setting out the itinerary for any Travel Event, the Travel Organiser must make clear any elements that may have physical demands on the participants or have any limitations on their abilities. This should allow participants to judge whether to attend or opt out of particular elements. Provided participants notify the Travel Organiser in advance, the itinerary can be adjusted to accommodate those participants.
- 8.2 It is not the Travel Organiser’s responsibility to assist any members with mobility issues, but a member may attend with another member nominated as their assistant/carer.
- 8.3 It is not the Travel Organiser’s responsibility to administer any medication. All members must have all necessary medication with them.
- 8.4 It is for the Travel Organiser to decide if vaccinations (Covid or other) are required for any trip.
- 8.5 The Travel Organiser may exclude any member from joining or continuing on a trip if they are clearly unwell and posing a health threat to other members.

## **Appendix A**

### **Insurance Check List**

Most importantly, the Third Age Trust (TAT) policies do not include personal accident/injury or travel insurance so participants must organise this themselves.

The following insurance cover is available through TAT policies for Barnet u3a events subject to applicable limits of indemnity and policy excesses:

#### **1.0 PUBLIC & PRODUCTS LIABILITY:**

1.1 This cover indemnifies all U3A members against all sums you could become legally liable to pay as a result of:

- a) Accidental injury to or death of any person.
- b) Accidental loss or damage to material property not belonging to you, which arises or is caused in connection with the 'business' of U3As.

#### **1.2 Principal exclusions**

- a) The use of motor vehicles in circumstances which require compulsory insurance under the Road Traffic Act.
- b) Any craft with an engine designed to travel in or through water, air or space.
- c) Loss or damage to property in the control of the insured.
- d) Extreme sports.

#### **2.0 MONEY COVER**

2.1 This policy covers U3A cash held in members' homes, hired premises and in transit.

#### **2.2 Principal exclusions:**

- a) Fraud and dishonesty.
- b) Loss from unattended vehicles.
- c) Shortages or errors.
- d) Loss resulting from the use of a key or combination code from premises outside normal hours.

#### **3.0 TOUR OPERATORS' LIABILITY INSURANCE**

This policy has been taken out to provide cover for a group convenor who wishes to organise a short study trip which involves overnight accommodation. It consists of:

3.1 Public and Products Liability – which provides indemnity against the legal liability for accidental injury to third parties or loss or damage to their material property arising in connection with the product/event.

#### **a) Principal exclusions:**

- i) The use of vehicles which require compulsory motor insurance under the Road Traffic Act.

- ii) Any craft with an engine designed to travel in or through water, air or space.
- 3.2 Legal Defence – which provides indemnity for costs arising and costs awarded in connection with the defence of proceedings brought or an appeal against a conviction relating to an alleged offence in the course of the business in respect of Part 11 of the Consumer Protection Act, the Trade Descriptions Act 1968 and the Package, Travel, Package Holiday and Package Tour regulations 1992, where there has been no actual injury or damage.
- a) Principal exclusions:
    - i) Fines or penalties.
    - ii) Compensation ordered or awarded by a court.
    - iii) Deliberate act or omission.
    - iv) Where injury or loss of or damage to property has occurred.
- 3.3 Emergency legal assistance – which provides indemnity to the insured in respect of costs and expenses incurred in providing emergency assistance to the passenger where such passenger suffers bodily injury or in the event of the death of the passenger, the passenger’s legal personal representatives.
- 3.4 Professional indemnity – which provides indemnity to the insured for the legal liability for damages and claimants’ costs and expenses in respect of claims arising for breach of professional duty by reason of neglect, error or omission occurring or committed in good faith. This also includes the cover required for ‘packages’ as defined in the Package Holiday Package Tour and Package Travel Regulations 1992.
- a) Principal exclusions:
    - i) Any claim arising from insolvency or bankruptcy of the insured or any tour operator or supplier of services.
    - ii) Dishonesty, fraudulent act or mission.
    - iii) Any claim or expenses resulting from the use of any mechanically propelled vehicle, aircraft or watercraft.

**Appendix B**  
**Travel Organiser Role Description**

**1.0 Ideas**

- 1.1 Thinking up the future one-day outings, longer trips within the UK, and overseas trips. No pre-determined frequency or proportion of each type of trip – these are for the Bu3a Travel team to decide.
- 1.2 Initial contact with venues, coach company and travel company to get provisional dates and prices and numbers of members that can be accommodated.
- 1.3 Create programme of future trips – probably aiming for minimum 6 months advance notice to the Bu3a membership.

**2.0 Bookings**

2.1 Day trips

- a) edit a pre-agreed template
- b) print for use at monthly meetings
- c) send to Webmaster and Updates editor for use in online bookings

2.2 Longer trips (UK and overseas)

- a) get booking form from Travel Agents .....

2.3 Keep records (spreadsheet) of all bookings and monitor numbers in relation to maximum for each trip

2.4 Maintain a waiting list once numbers reach maximum capacity.

2.5 Create list of travellers with their ICE info for use on the trip.

2.6 In order to ensure that coverage under the Third Age Trust insurance policies is not prejudiced, participation in Travel Events is limited to current members of Barnet u3a and a record must be kept of all those going on the events.

**3.0 Advertising**

3.1 Bu3a Website – this is not looked at by many members but is the better place to have more detailed information available and for online bookings to be made. Liaise with Website Manager to agree how each event is to feature. Notify Website Manager immediately of any changes of status to ensure the site is as up to date as possible.

3.2 Weekly “Update” via email – this goes out to approx 95% of the membership but only approx 60% open these emails. Liaise with Updates Editor to agree how events are to be advertised. Ideally have brief information with links back to Website.

- 3.3 Quarterly “Newsletter” via post – this goes out to 100% of the membership but deadline for editing, printing and then posting is approx. one month before being seen by the membership. Given the delay in getting this information to the membership this needs to concentrate on trips in the longer-term. Perhaps some words and photos from trips that have already happened.
- 3.4 Attempt to get royalty free or with-permission image(s) appropriate to each trip for use in both Website and Updates.

### **4.0 Monthly Meetings at Ewen Hall**

- 4.1 These are attended by between 150 and 200 members but historically those members interested in Bu3a travel do make the effort to attend and the Bu3a Travel desk is often the busiest part of the hall during tea/coffee pre-meeting.
- a) Have display of up-coming trips
  - b) Print booking forms
- 4.2 Probably needs a minimum of two members of the Bu3a Travel team at the desk from 9:30 to 10:30

### **5.0 Finance**

- 5.1 Create budget for each trip based on a reasonable number of members and known costs.
- 5.2 Liaise with Bu3a Treasurer regarding payment of invoices and expenses.
- 5.3 Receive payments - cheques, card pay at Monthly Meetings, PayPal online (?)
- 5.4 Keep spreadsheet record of all costs and income for each trip

### **6.0 Management of Trips “On The Day”**

- 6.1 Agree pick-up points with coach company nearer to date of trip when it will be known what assistance will be available.
- 6.2 Decide if assistance is required at each pick-up.
- 6.3 Take lead on trips at key points – pick-up, drop-off, meal times, etc.

### **7.0 Recording the Event**

- 7.1 Arrange for a number of photos of the Event to be taken.
- 7.2 A brief report of the Outing should also be compiled, either by the organiser or by one of the participants who agrees to take on this task.
- 7.3 Both the photos and the report should be sent to the Barnet u3a Website Manager for possible inclusion on the Barnet u3a web pages.
- 7.4 Check with each attendee whether they are happy for photographs of him/her to be published in a public forum (see Appendix C).

## **8.0 Timeline of Activities**

The following may help as a checklist for Travel Organisers, with the following broad actions being necessary and in the following sequence:

- a) Obtain approval of the Executive Committee for the proposed Travel Event.
- b) Develop the proposal.
- c) Publicise the proposed Event to gauge interest.
- d) If there is adequate interest, finalise the details, including (where payments are to be made through Barnet u3a) clearing the proposed timetable with the Treasurer.
- e) Perform a risk assessment.
- f) Make provisional booking(s) where necessary.
- g) Provide details of the proposed Travel Event to the Update editor and to the Website Manager.
- h) Seek payment by all attendees.
- i) Finalise booking and make outstanding payments.
- j) Keep attendees informed of all arrangements well in advance (using Appendix C).
- k) Have a system for alerting attendees of last-minute changes or cancellation.
- l) On the day, act as leader to ensure all attendees enjoy the Event.
- m) Ensure all attendees remain safe.
- n) Coordinate the preparation of report and photos.
- o) Advise the Committee of any lessons learnt from the Outing and its organisation.

**Appendix C**  
**Suggested Communication to Attendees**

We are pleased that you are considering joining us on a forthcoming outing, trip or cruise (Travel Event); we would like to take this opportunity to bring the following important matters to your attention.

All our Travel Events are organised and run in accordance with our Guidance for Travel Organisers which is available to inspect on our website under “Policies and Procedures”.

The organiser(s) attending this event are fellow members of the Barnet u3a; they are volunteers and will not take responsibility for other members of the group or their belongings. They have paid the full amount of the holiday and expect to be able to enjoy it as much as anyone else in the group. Please respect them at all times. Any complaints, comments, etc. should be taken up with them direct and in no circumstances taken up with the coach driver and/or guide.

It is essential that you are able to get on and off the coach unaided and can carry your own hand luggage. You must be able to take your case(s) to the baggage hold on the coach, so the coach driver can stow them aboard. Each item of your luggage must be labelled clearly with your name (also your cabin number if appropriate) – labels will be supplied by the travel or cruise company. Where possible we arrange for portorage at hotels. At cruise terminals your cases will be taken from the coach to your cabin door by members of the ground staff/crew.

Timings are extremely important – the organiser(s) will not delay departure which would affect onward journeys, meeting up with guides etc. When leaving the coach, you must be aware of the time you will need to return to avoid keeping others waiting – or being left behind!

Some local day outings may not involve coach travel, and you will be given a suggested journey to the venue, but it will be up to members to make their own way there. The organiser does not take responsibility until the group meets at the venue.

You must make the organiser(s) aware of any issues which might affect your ability to keep up with the group or partake of the activities/events in the itinerary. Should you decide to leave the group at any time you must ensure that the organiser(s) have been told and that you have clearly arranged where you will rejoin the group.

Our trips offer plenty of visits and experiences to take advantage of the opportunity to explore new areas. They naturally involve a fair amount of getting on and off the coach, walking etc., but we do try to minimise difficulties for those with mobility problems. There may be times when, due to local information, conditions and/or weather, we might have to make last minute changes for the benefit of the whole group.

Reserved seating on the coach is at the discretion of the organiser(s) including those for anyone with mobility problems. Single travellers should sit with others on their own to leave seats for couples to be together. Any decision to move seat should be mutually agreed to avoid any friction.

When we are at the venue/hotel/ship please follow all their requirements. Please make yourself acquainted with all fire and safety procedures.

**Insurance:** The Third Age Trust policies do not include personal accident/injury or travel insurance therefore you are responsible for your own personal accident/injury insurance and travel insurance in respect of this Travel Event.

**ICE (In Case of Emergency):** You must carry a clear note of the person who should be contacted in an emergency (can be a relative or friend, but not someone else on the trip) with landline/mobile numbers where they can be reached. Your insurance details should also be included.

**Medication:** You must carry details of your medication (and any ongoing treatment) which can be handed to a professional should an emergency occur. This could save considerable time.

We aim to keep you safe during this Travel Event. Please assist by following all guidance and instructions given by the organiser and/or our hosts throughout the event

You must ensure that your ICE, medication, passport and tickets are readily accessible in your handbag/wallet/pocket and not packed in your suitcase.

**Meals and dietary requirements:** The preferred time for evening meals is 19:00 (or 19.30 latest) and this will be agreed with our hosts and will apply to the whole group. Dietary requirements should be notified at the time of booking the trip i.e. vegetarian, vegan, no pork or shellfish, etc. We will always try to arrange an alternative and a cheese and biscuit option for dessert – but choices are usually more restricted at hotels on the continent.

Tips for the Coach Driver and Guide (where appropriate) have been built into the cost of the holiday. Gratuities to the hotel and/or staff are left to the individual.

Please be considerate when using a mobile phone – nobody else wants to listen to your conversations!

If you are a National Trust member and taking advantage of a reduced price for this outing, you must remember to bring your NT membership card with you.

We would like to take some photos to publish after the Travel Event. If you do not want your image used in a public forum, please let us know before the Event date.

**Waiting lists and cancellation policy:** When confirmed bookings for any Outing reach capacity we will create a waiting list which will be prioritised by date/time of booking or enquiry. If we receive a cancellation from anyone, we will endeavour to fill the space from the waiting list or, if the bookings have not reached capacity, by continuing to advertise available spaces on the outing. If we are able to fill a space created by a cancellation, we will make a full refund of the amount paid. In the case of Trips or Cruises booked through a travel agent, refunds will be subject to their cancellation policy.

Above all we aim to make the Trip interesting and information, friendly and fun. We hope you will enjoy yourselves.

By proceeding with your booking, it will be deemed that you accept all the above and that you will conform with our requests, particularly with regard to insurance, ICE & medication information.