

## GUIDELINE FOR VISITS

### PURPOSE

- To recommend the procedures to be followed to ensure the safety of our members when taking part in a visit organized for them. This will mean the visit will be covered under the Trustee Indemnity Insurance provided by the Third Age Trust.
- To satisfy the u3a Committee (Trustees) that the financial arrangements are transparent.

### SCOPE

A visit means an organized trip. It includes, for example, a holiday with travel and hotel stay, or a day trip by coach to an historic house.

A day trip to a local place of interest with private transport arrangements is not subject to this guideline. However, a list of participants is recommended and the principles may be helpful.

### RESPONSIBILITIES OF THE VISIT ORGANIZER

- To notify the Committee of the proposed visit prior to advertising it. To identify the Interest Group, the visit leader and deputy in case of illness, the proposed date and pertinent details.
- Once approved by the Committee, the visit can be advertised.
- To record necessary details of the attendees including their emergency contact information. *To make clear to them whether payments are refundable in the event of non-attendance.*
- To follow our Privacy and Data Protection Policies. To take an accident reporting form on the visit.
- To keep a list of all participants with non-u3a names identified. *It must be clear to non-u3a members that they are not covered by the u3a liabilities insurance.*
- To provide the list to the Visits Co-ordinator if/when requested.
- To price visits as close to operating costs as possible. An account of monies collected and invoices paid should be kept and provided to the Treasurer when/if requested.
- Preferably all monies should go via the Treasurer. Out of pocket expenses, such as tips and coach parking can be paid in cash and refunded to the organizer by the Treasurer.

*Please consider car parking arrangements. At coach collection points some public halls do not want their car parks used.*