

## FLINTSHIRE u3a OUTINGS POLICY

This policy sets out the requirements for arranging outings for Flintshire u3a (Fu3a) members.

### Objectives:

- To provide a framework which enables members to participate in outings in accordance with the Third Age Trust's insurance policies.
- To provide guidance for anyone arranging outings for Fu3a members to ensure consistency across the organisation.

### Scope:

1. This policy applies to coach / mini-bus outings arranged for Fu3a members whether:
  - i. Open to all members (arranged by the Outings Co-ordinator)
  - ii. Group Outings (arranged by Group Co-ordinators) which are in addition to the group's usual meetings (indoor or outdoor).
2. This policy relates to outings which are day visits (less than 24 hours). See 4. below
3. For any outings which would involve an overnight stay, please contact the Fu3a Outings Co-ordinator and Treasurer for advice before making any arrangements, as this requires specific advice about financial risk and insurance cover.

### Insurance

4. The Third Age Trust liability insurances cover is for outings **for members only** that are less than 24 hours and do not include an overnight stay. The Trust does not offer Travel Insurance and the responsibility for this is with the individual. (extract from u3a Financial Matters – Guidance: Finance).
5. Outings organisers must ensure that everyone travelling on the outing is an Fu3a member and should not permit anyone who is not a member of Fu3a to travel (except as set out in 6. below). This applies even if it means that places on an outing are not filled.

6. Carers / companions who are not Fu3a members can accompany a member on an outing, but this requires prior Committee approval and payment of the relevant amount for the outing. In such cases, please contact the Outings Co-ordinator for advice before confirming the request for a place for the member or their carer. The guidance from Third Age Trust is that should a member not be able to participate independently in Fu3a activities a carer/companion is essential. It is not acceptable for insurance reasons for the responsibility of care to be left to fellow members unless there is a specific arrangement in place with an individual member who may well be a friend.

### **Outing Programme / Location**

7. When considering possible locations / programmes for outings, organisers should be aware of the objectives of Fu3a which is the advancement of education by all means, including associated activities conducive to learning and personal development.
8. Outings arranged by groups should be pertinent to the nature of the group.

### **Outing Dates**

9. Group Co-ordinators are asked to liaise with the Central Diary Holder about dates before arranging any outings which are other than on their usual meeting day. This will help to avoid clashes of dates and enable members who wish to take part in the full range of Fu3a activities on offer.

### **Advertising of Forthcoming Outings**

10. For Outings arranged by the Outings Co-ordinator, the notification should go out to the entire membership of Fu3a.
11. For Group Outings, the notification should only go out to members of that group. If there are spare places available on an outing after members of the group have had reasonable time to respond, then any spare places can be offered to the wider membership within Fu3a.

12. Where there is a forward programme of outings, the opportunity to register an interest in the outing should be on the basis of one outing at a time. Dates and venues of outings can be published in advance to give members prior notice, but organisers should not take expressions of interest in forthcoming outings until registration for the specific outing has been opened so that all eligible members have equal opportunity to register.
13. All outings should be offered to those eligible on a first come, first served basis. Where an outing is fully subscribed, organisers should keep a reserve list in case of cancellations and offer any places which do become available in the order the names appear on the reserve list. (see 21. below).
14. The organiser of the outing should keep a record of the bookings made and payments received. We are not able to provide this facility through the Beacon system.

## **Finances**

15. Anyone arranging an outing is asked to liaise with the Fu3a Treasurer before making any arrangements to agree pricing, payments and arrangements for collection and banking of monies. Anyone arranging an outing should obtain the Terms & Conditions of the Coach Company and Venue(s) prior to making any commitments or bookings. Quotations (in writing or by email) should be obtained for all costs involved e.g. coach hire, admission fees, refreshments etc, before determining the price for the outing.
16. The pricing of outings should be on the basis of breaking even. Where there are multiple outings arranged in a year, the aim should be to break even over the course of the year. In the event of a deficit on a group outing, this is the responsibility of the group.
17. Any gratuities should be dealt with outside of the price charged for the outing and left to the discretion of members attending.
18. Members who organise an outing for Fu3a members should not benefit if a venue should offer a free place. The value of the benefit should be shared by all members on the outing.

19. Members can be offered the facility to pay for outings by BACS, cheque or cash. Where feasible, payment may be taken by card (please contact the Treasurer to arrange).
20. Members should be advised that payment should only be made when they have had a place on the outing confirmed. Payment should be made by the deadline set or the place may be forfeited if there is a waiting list
21. In the event of members cancelling their booking, refunds are only available if the place can be filled from the reserve list held.
22. The list of members taking part in the outing should be finalised at least two working days prior to the outing taking place, to enable the necessary Health and Safety documents to be completed and submitted (see 26. to 32. below).
23. Any cash or cheques should be passed by the organiser to the Treasurer for banking at least two working days prior to the outing taking place.
24. Invoices for admission to venues and coach hire should be passed to the Treasurer for payment allowing reasonable time for payments to be made so that they reach the venue or coach company in accordance with their payment terms. Venues and coach companies should be advised that Fu3a's preferred payment method is BACS and organisers should obtain the necessary bank details from suppliers.
25. Members who sign up and pay for a Fu3a organised event or outing do so at their own financial risk. Should there be a cancellation, delay or change arising from events outside the control of Fu3a, there would be no automatic refund of monies paid. However, in exceptional circumstances, the Fu3a Trustees may (at their discretion) consider some financial recompense, on a case by case basis.

## Health and Safety

26. Fu3a has a duty of care towards its members. Their safety and wellbeing at any Fu3a organised activity is paramount.
27. The purpose of this policy section is:
- to act as a guide to anyone arranging an outing for Fu3a members.
  - to ensure all reasonable steps are taken to protect members who have elected to go on an Fu3a organised outing.
  - to provide the organiser with the reassurance that they have fulfilled their reasonable responsibilities.
28. Most of the requirements are covered by pre-visit preparations which are listed below and should be followed:
- Consideration, completion and submission of the documents listed below (see 33. below and the examples which are set out at the end of this document).
  - The notification to members about the visit (written or verbal), should refer to the Access Statement of the venue they are visiting (where available).
  - This will enable members to make an informed decision about whether or not the visit is suitable for them.
  - It is ideal if the organiser can visit the proposed venue prior to the visit taking place.
29. The finalised list of members taking part in the outing should be sent electronically to the Outings Co-ordinator two working days prior to the visit so that emergency contact information can be compiled.
30. The Outings Co-ordinator holds emergency contact details for members who have attended Fu3a outings previously. In order to ensure compliance with Data Protection Regulations (GDPR), they are used only for the purpose stated and are stored securely.
31. Following receipt of the finalised list for the outing, the Outings Co-ordinator will provide emergency contact details to the organiser for use on the day of the outing and also the names of any members for whom details are not held and need to be obtained on the day using the Contact details for Outings Form (see Document 4 attached).

32. Emergency contact details should be held securely on the day of the outing and returned to the Outings Co-ordinator as soon as practicable after the outing.

33. Documents 1, 2 and 3 should be sent to the Fu3a Business Secretary on [business.secretary@flintshire-u3a.co.uk](mailto:business.secretary@flintshire-u3a.co.uk) at least 24hrs (one working day) before the visit takes place and copies retained by the organiser.

- Document 1 – Risk Assessment – General risk assessment checklist
- Document 2 – Risk Assessment – specific risks. The content of this will vary from visit to visit. It aims to identify and take into account the nature of the visit and any particular features of the visit or the venue which may pose risks and the steps which will be taken to mitigate these. See example attached.
- Document 3 - Register of Attendees Form (Names and Membership Numbers only.)  
The organiser can use this as their register on the day.

34. On the day of the visit, the group organiser should ensure that everyone on the visit is provided with the group organisers mobile contact number as they leave the coach so that they can be contacted if necessary.

35. Copies of this policy can be found under “Policy Documents and Procedures” in the Documents Section of the Members Area of the website <https://flintshire.u3asite.uk/documents/>

36. Downloadable versions of Documents 1,2,3 and 4 for use for each outing can be found in the Documents Section of the Members Area of the website <https://flintshire.u3asite.uk/documents/>

Any assistance required with interpretation of this policy should be directed to either:

Fu3a Outings Co-ordinator on [roberts\\_lesley@hotmail.com](mailto:roberts_lesley@hotmail.com)

Fu3a Treasurer on [treasurer@flintshire-u3a.co.uk](mailto:treasurer@flintshire-u3a.co.uk).

**FLINTSHIRE u3a OUTING - RISK ASSESSMENT CHECKLIST**  
**TO BE COMPLETED PRIOR TO OUTING**  
**COPY TO BE RETAINED BY OUTING ORGANISER**

**NAME OF ORGANISER:****VENUE:**

**CHECKLIST:** This checklist is to help in the planning for an outing. It will probably need to be supplemented to suit the specific requirements of a destination or venue. Document 2 should be used for this purpose.

| Checklist                                                                                                                                                                                                                                                             | YES | NO | N/A | If no, what actions will you take to mitigate this risk? |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----|----|-----|----------------------------------------------------------|
| Use a reputable licensed coach company.                                                                                                                                                                                                                               |     |    |     |                                                          |
| Obtain the coach company's risk assessment.                                                                                                                                                                                                                           |     |    |     |                                                          |
| Request the coach driver does a safety announcement                                                                                                                                                                                                                   |     |    |     |                                                          |
| Organiser to ensure that all outing participants are Fu3a members.                                                                                                                                                                                                    |     |    |     |                                                          |
| Fu3a Business Secretary to be given a copy of venue/s and attendees 24hrs (one working day) before the outing                                                                                                                                                         |     |    |     |                                                          |
| Potential participants to be given accurate information about the demands of the outings to enable them to make an informed decision about its suitability for them. If one is available, they should be referred to the Access Statement of the venue to be visited. |     |    |     |                                                          |
| All participants to be given the itinerary details of the travel arrangements, and clear information about pick up and drop off times and locations.                                                                                                                  |     |    |     |                                                          |
| If the group is staying together at the location, outing organiser should carry a basic First Aid Kit.                                                                                                                                                                |     |    |     |                                                          |
| All participants to be made aware of the emergency procedures (e.g., what to do if someone becomes lost) They should have the organiser's phone number                                                                                                                |     |    |     |                                                          |

**Original Checklist Date:****Signature:****Copy to be retained by Outing Organiser**

A copy of this form should be sent to the Fu3a Business Secretary on [business.secretary@flintshire-u3a.co.uk](mailto:business.secretary@flintshire-u3a.co.uk) at least 24hrs (one working day) before the visit takes place and a copy retained by the organiser.

**RISK ASSESSMENT – SPECIFIC RISKS**

(Example)

**Fu3a Visit to Arley Hall and Gardens/Liverpool**

**5<sup>th</sup> Dec 2023**

**Additional Points for Risk Assessment**

- Arley Hall has all reasonable safety precautions in place.
- Potential participants on the trip were given clear information about the buildings and garden and invited to request further details if they wished.
- Participants will be reminded that there may be some uneven surfaces both at Arley Hall and in Liverpool.
- In anticipation that by the time we leave Liverpool it will be dark and probably busy, it will be emphasised that it's vital that people take careful note of the pick-up point and arrive back there promptly for a 5.30pm departure. Everyone will be given the organiser's phone number.
- Organiser/coach driver will assist people getting off the coach if required /desired.

A copy of this form should be sent to the Fu3a Business Secretary on [business.secretary@flintshire-u3a.co.uk](mailto:business.secretary@flintshire-u3a.co.uk) at least 24hrs (one working day) before the visit takes place and a copy retained by the organiser.

**FLINTSHIRE u3a RISK ASSESSMENT: REGISTER OF ATTENDEES****NAME OF GROUP:****NAME OF VISIT ORGANISER:****DATE OF OUTING:****DESTINATION:****COACH COMPANY & CONTACT DETAILS:****TOTAL NO. OF MEMBERS:**

| <b>Members</b> | <b>Membership No.</b> | <b>NAME</b> |
|----------------|-----------------------|-------------|
| 1              |                       |             |
| 2              |                       |             |
| 3              |                       |             |
| 4              |                       |             |
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| Members | Membership No. | NAME |
|---------|----------------|------|
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| 27      |                |      |
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A copy of this form should be sent to the Fu3a Business Secretary on [business.secretary@flintshire-u3a.co.uk](mailto:business.secretary@flintshire-u3a.co.uk) at least 24hrs (one working day) before the visit takes place and a copy retained by the organiser.

## CONTACT DETAILS

**Flintshire u3a - Contact Details for Outings**

I am providing the information requested below on the understanding that:

- It is used only for the purpose of an Fu3a Outings Organiser needing to contact me. or use my emergency contact number before, during or after an Fu3a Outing.
- It will be securely stored by an Outings Organiser.
- It is my responsibility to ensure that the information supplied is accurate and to inform the Outings Organiser of any changes.
- I can request at any time that the information is destroyed.

Name: \_\_\_\_\_ Mem. No.: \_\_\_\_\_

Email address: \_\_\_\_\_

Mobile Phone No.: \_\_\_\_\_

Emergency Contact Name: \_\_\_\_\_

Emergency Contact Mobile Phone No.: \_\_\_\_\_

Signed: \_\_\_\_\_ Date: \_\_\_\_\_

### Policy Review:

The review and implementation of this Policy will be monitored by the Committee.

| <b>Fu3a<br/>Version</b> | <b>Description of changes</b>                                                                                               | <b>Reviewed by</b>                                        | <b>Date<br/>Reviewed<br/>(Committee)</b> | <b>Next review due</b> |
|-------------------------|-----------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------|------------------------------------------|------------------------|
| <b>1</b>                | New Policy                                                                                                                  | Treasurer &<br>Outings Organiser                          | 19 <sup>th</sup> Mar 2024                | <b>October 2024</b>    |
| <b>2</b>                | Review but no change made                                                                                                   | Treasurer &<br>Outings Organiser                          | 19 <sup>th</sup> Nov 2024                | <b>November 2026</b>   |
| <b>3</b>                | Clarification of scope (para 1-3).<br>Insertion of Disclaimer (para 25).<br>General updates to latest<br>working practices. | Treasurer, Outings<br>Organiser &<br>Committee<br>Members | 20 <sup>th</sup> Jul 2026                | <b>October 2028</b>    |