



## Advice Sheet – Travel & Study

1. The activities that are covered in this policy document are:
  - Study Trips – outings away from the group’s normal meeting place as an extension of a group’s study activity. These can be of 2 types; those involving overnight accommodation and travel or just day trips involving travel only.
  - Holidays – trips over several days in either UK or Europe that have no study/interest element.
2. For the purposes of this document it is assumed that an organiser will need to be appointed by the group leader to make all the necessary arrangements for a study trip or holiday. For complicated and/or large activities the organiser may well appoint additional helpers. In some instances the group leader may also carry out the role of organiser.
3. Finances
  - a. Any financial arrangements for a study trip or holiday, not involving a travel agent, must pass through an official Malvern U3A account. In addition all contracts must be signed by the Group Leader or a Malvern U3A trustee on behalf of and in the name of the Malvern U3A.
  - b. In principle, individual organisers should not make group financial arrangements in their own name as it becomes a personal transaction placing them at the risk of not being covered by the U3A insurance. Organisers of short study trips (not holidays), using personal credit/debit cards for group bookings, may be covered by U3A’s Tour Operator insurance but do so at their own risk. Thus:
    - **All group bookings for overnight accommodation should where possible be made through a registered travel agent.** Ideally all arrangements associated with overnight trips (accommodation, travel etc) should be considered together as a ‘tour’ and made through a travel agent.
    - All monies due by members for such activities are to be paid in advance either to the travel agent direct or via the organiser (cheques should still be payable to the travel agent).
    - When organising holidays, care must be taken in making any prepayments, as there is no money cover insurance provided for such situations.
  - c. For small parties (6 or less participants), members may make individual arrangements for accommodation although they should be made aware that they may not be covered by the U3A insurance. All payments should be made on an individual basis, directly to the provider and not to Malvern U3A. In this way a contract is clearly established between an individual and the provider rather than with Malvern U3A as an entity, which is a much safer way to do it.
  - d. Transport should be arranged through the travel agent or direct with the provider in the case of day trips. Members’ payments for these and any other group costs (entrance fees etc) must be made in advance and through a U3A account. Travel by private car is at the discretion of the driver/owner and it



is his/her responsibility to ensure adequate insurance. If there is any doubt the member is advised to check with their insurance company.

#### 4. Cancellations

If a potential attendee cancels after having paid their costs up front and cannot be replaced by another member, they forfeit the payment unless the organiser can recover some or all of the costs. Generally this will mean that accommodation costs may be recovered but the share of group transport will not.

#### 5. Health & Safety

Organisers of any activity that involves more than a normal level of risk (eg other than attending a meeting at a house or hall) should consider this aspect of the activity and take reasonable precautions to minimise the risk to members. In most cases this will require the application of common sense. Where a degree of specialised knowledge is required the organiser should not proceed unless there is someone with that knowledge available to advise (generally the group leader will have the necessary expertise).

Group leaders should consider the following when planning activities:

- a. The attendees should know the contact telephone number for the organiser. If possible the organiser should have an up to date list of emergency contact numbers for those attending the activity. It is essential that the organiser ensures that the contact mobile telephone is both fully charged the night before the event and has an appropriate amount of credit. For overnight stays a charger is a necessity. In addition, the organiser must have a list of telephone numbers for Malvern U3A Committee members.
- b. Members should be encouraged to carry ICE (In Case of Emergency) cards on their person. Members with mobile phones should also be encouraged to have an ICE entry in the directory of their mobile. Although not mandatory, these are "best practice" recommendations and to assist with this space for ICE details are included on the back of membership cards.
- c. In the event of a serious accident or medical emergency, the organiser or group leader should arrange for the emergency services to be alerted. First aid training may be available on application to the Groups Organiser.
- d. If travelling with a tour operator, organisers are NOT responsible for the health & safety of members. They should not assume that this will be covered by the tour operator and/or hotel management. Organisers should establish who is the tour operator's recognised representative and ensure that they have their contact telephone number in case of emergency. In addition, they should establish whether the hotel has 24 hour reception and if not make alternative arrangements (eg cover for members left in hotel rooms).
- e. In the event that a participant becomes incapacitated the organiser must delegate responsibility for the welfare of the affected participant to either another member/participant of the group who has volunteered to care for the affected person or, if appropriate, the tour operator's representative or the hotel reception.
- f. In the event of an accident Group Leaders are to complete an Accident Report Form and send it to the Groups Coordinator. If a member of a group requires serious medical attention (eg admission to hospital) group leaders are to inform a member of the Malvern U3A committee of the details as soon



as practical.

6. The following information is available from the Malvern U3A website or by application to the Groups Coordinator.

- Advice Sheet – Insurance
- Accident Report Form

Links to other National U3A advice documentation are also available from the website.