

Guidance for Members Organising Residential Trips and Visits

Trips and visits where members spend time away from home are a much appreciated part of our programme.

The Third Age Trust has reminded us that the Committee as Trustees have some legal responsibilities, and that everyone who organises a trip also needs to take care of handling money. To give two examples; we might face legal action as a U3A if a third party was claimed to have been hurt through the actions of a member on a U3A organised trip. If a member placed money in their own bank account and, unfortunately, unexpectedly died before transferring it to the U3A, the U3A would face the problem of it being part of their estate. Trips both at home and abroad can involve the collection of sums of money that are large compared with Chesterfield U3A's bank balance.

The Committee asks, therefore, that the guidance below is followed in respect of any residential trip or visit organised under the U3A umbrella. Where this guidance has not been followed, the trip cannot be considered a U3A activity, and such benefits as the third party insurance cover provided by the Third Age Trust will not be available,

*You may wish to organise a residential visit for a specific U3A group or for U3A members in general. If so, the Third Age Trust requires that **you must first seek approval from the Committee** with details in writing or by email giving an overview of the purpose of the visit, where to, when, at what costs for places, etc, **before** advertising it to the membership.*

*If the visit is approved by the Committee, any money collected for a deposit or full payment should preferably be taken from each member by a cheque payable to Chesterfield U3A Social Fund. If, however, you collect cash payments, you must give each member a receipt and you **should not, at any time**, hold any cash that is collected in your own bank account. It should also be handed to the Treasurer as soon as possible for deposit in the Social Fund. This is to safeguard both you and the members. At the appropriate time, let the Treasurer know And a cheque will be issued for payment to the operator on behalf of the group.*

Where this is possible, you may wish to arrange for members to pay fees directly to the tour operator, so eliminating the need to pay anything over to the Treasurer, but it is recognised that this may be more complex for the organiser, so that collection of dues and their payment to the Treasurer will normally be preferable.

This guidance will remain available on the web site.

Joyce Hart