

Weston-super-Mare



Policies and Procedures

Revision 7

Rev. 07a Updated; 28 July 2023

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U3A COMMITTEE

1. u3a Assets

Property paid for entirely by groups belongs to the group and should not be included in the u3a Inventory, or therefore in u3a insurance. If the group subsequently folds, then its property should revert to the u3a.

2. Non-u3a Advertising/Information

Through Announcements on Tuesdays, Noticeboards, Newsletter, Website, e-mail system and within Groups

- a. No charities other than Weston HospiceCare will be promoted at all.
- b. No commercial advertising at all.
- c. No member-to-member “ for sale” or “ wanted” advertising.
- d. Member advertising for, or offering help to, other members will be accepted for the noticeboard, on the website, and in Groups through Group Leaders.
- e. Notices about u3a organisations may be accepted for the noticeboard (at discretion of the Secretary), Website (at Webmaster’ s discretion) and in Groups (at Group Leaders’ discretion).
- f. u3a adverts for help or equipment will be acceptable for Announcements on Tuesday coffee mornings, Noticeboards, Newsletter, Website, e-mail system and in Groups.

3. Capping membership

Capping membership is contrary to the aims of the Third Age Trust and numbers likely to attend all u3a events can be accommodated.

4. Media Policy

The committee supported the principle that the Newsletter Editor and Website Manager should have editorial freedom within the policies decided by the committee.

5. Groups

- a) Any application from a Group Leader for financial or other support will be considered on its merits by the Treasurer.
- b) Equipment to be purchased by a group should normally be selected by the Group Leader, and when agreed by the Treasurer, purchased by the Group Leader and the invoice presented to the Treasurer for payment, who will then notify the secretary to update Inventory list.
- c) Equipment purchased by the u3a must be made available to other groups.
- d) Equipment must be stored carefully, and in accordance with the manufacturers’ instructions, by a named u3a member and entered on the inventory.
- e) u3a equipment is covered by our insurance.

- f) The fee for groups meeting at members' home to cover tea/coffee and biscuits will be determined by Group Leaders, who may charge more where there are specific additional costs associated with running their particular group (library fees for example). Any surplus can be used entirely at the Group Leader's discretion for incidental expenses and consumable goods. It does not need to be accounted for to the u3a.
- g) Fees for group meetings in halls are £2 per person not including tea/coffee and biscuits. The £2 is collected by the Group Leader, who does not pay £2, and returned (with group registers) to the Treasurer, at regular intervals which must not exceed three months.
- h) It should be understood that many groups do not fully cover hall hire costs and are therefore subsidised by the u3a out of annual subscriptions. However, the committee's policy is that at least 70% of costs are met by the groups.
- i) Small expenses incurred by groups should be covered by their coffee money. For larger items of equipment, the Group Leader should apply to the Treasurer via the Group Co-Ordinator in advance.

6. Charitable Giving

Weston HospiceCare will continue to be the only charity supported by the Weston u3a. This is limited to the u3a facilitating a monthly raffle whereby the organisers of the raffle held at the coffee morning on the first Tuesday of each month pay money received directly to the HospiceCare shop.

Weston u3a support for other Weston HospiceCare fund raising events may be permitted at the discretion of the committee.

7. Age Limit for Membership

There is NO lower age limit for anyone wanting to join the u3a. However, prospective members must be willing and able to participate in u3a activities during weekdays.

8. Code of Conduct for u3a Trustees

Introduction

“Charity trustees are responsible for controlling the management and administration of a charity. They should work together as a team and have collective responsibility for their charity” (Charity Commission).

A trustee code of conduct is an agreement between the organization and the individual committee member, which spells out the standards of behaviour expected from trustees.

New trustees must be advised of the code as soon as they join the committee, and formally asked to accept it. The committee should make sure on each occasion that the acceptance is minuted.

General

- Trustees must read the Charity Commission leaflets on the responsibilities of Charity Trustees CC3, CC3a and “ Being a Trustee” , which can be downloaded from the Charity Commission website.

- Trustees are expected to know, follow and promote the Aims and Guiding Principles of the u3a Movement at every opportunity.
- Trustees must always act in accordance with the requirements of the Weston u3a Constitution in order to uphold the best interests of Weston u3a and the u3a Movement as a whole, and to maintain its reputation and never do anything which could bring Weston u3a or the Movement into disrepute.
- Trustees are expected to reflect the current organizational policy of Weston u3a, regardless of whether it conflicts with their personal views.
- Trustees are expected to abide by Weston u3a' s governance procedures and practices.
- Trustees must never derive any pecuniary benefit from being a trustee and must notify the Chairman of any gifts received.
- Trustees are expected to use Weston u3a' s resources responsibly and in accordance with its stated objectives.
- Trustees should inform the Chairman before accepting an invitation to speak on behalf of the u3a.
- Trustees will respect both the authority of the Chairman, or other committee member acting as meeting leader, and accept majority committee votes as final.
- Trustees are expected to treat fellow committee members courteously and maintain a respectful attitude towards opinions of others.
- Organisational, committee and individual confidentiality must be respected at all times.

Specific - Committee Meetings

Preparation for and attendance

Trustees are expected to study the agenda and all supporting papers prior to the meeting. Trustees should strive to attend all meetings.

Conflict of interest

Trustees must declare a conflict or possible conflict of interest at the start of the committee meeting, or at the earliest possible opportunity. The Chairman will then decide whether to exclude the trustee for a particular agenda item or even from the whole meeting. In the event that the Chairman has a conflict of interest, then the committee should request the Vice-Chairman to rule on the matter.

Confidentiality

In order that all trustees feel comfortable expressing their views and ideas it is essential that everybody maintains complete confidentiality outside the committee.

The decisions made by the committee are minuted and once approved, are available to all members. Care must therefore be taken to ensure confidentiality is maintained.

Corporate responsibility

No matter what individual trustees' opinions or voting choices are, once an item is approved by the committee, all trustees must accept it as decisive and final, without further comment.

Procedure to be followed in the case of any Breach of this Code of Conduct

In the event of a report of any trustee allegedly breaching this code of conduct, or if a breach becomes apparent, the Chairman will immediately appoint two trustees to establish the facts and report back. The result of these independent investigations must not be disclosed to any other trustees.

NB. If the complaint concerns the Chairman, then the Officers acting as a group should take responsibility.

For minor breaches of the code, the Chairman shall use his/her best endeavours to resolve the problem amicably and quickly. This may be achieved through an informal chat with the trustee in question, especially if the breach has occurred during a committee meeting and therefore requires no prior investigation. However, even an informal discussion should not be vague. The problem or issue needs to be identified, the views of the trustee should be heard and the Chairman should make clear the change required and the consequences of repeating the behaviour in question. A written record of the informal discussion should be kept on file, but it should be stressed that this is not part of any formal disciplinary procedure. However, if this process is not effective in reaching a solution, or if it is felt that the breach is serious enough to require formal disciplinary action, the following procedure should be applied:

Level 1

A verbal warning from the Chairman making clear the nature of what was unacceptable and warning about future conduct. This should be recorded with a date and kept on file.

Level 2

A confidential letter from the Chairman clearly itemizing the unacceptable behaviour, stating the improvement required with immediate effect.

Level 3

A final written warning which states that if the behaviour is repeated again the trustee will be asked to leave the committee, with immediate effect. At this stage the committee will be fully informed and copied in to all correspondence.

Level 4

The trustee is asked to leave the committee

Right of Appeal

At each stage of the formal disciplinary procedure there is a right of appeal, providing it is lodged within a 7-day period. This can take the form of written representation or the desire for a right of reply.

Hearing an Appeal

If a decision is appealed and the trustee wishes to appear before the committee, the trustee should be invited to attend a specially arranged meeting, with a friend if so desired, who may also speak. The Chairman should summarise the issue and invite the trustee to state his/her case. The trustee should then be informed when a decision will be communicated. The matter should be fully discussed, taking into account any mitigating circumstances. Once a decision is reached the trustee should be informed in writing.

**NB. The committee's decision following an appeal is final.
Absolute confidentiality must be maintained.**

Should you be in the unfortunate situation of having to resort to the formal disciplinary procedure, please remember the following: -

- All action taken must be documented.
- You must at all times act fairly and even-handedly.
- In most cases disciplinary action should begin at Level 1.
- Levels 3 & 4 should only be invoked in the case of either extremely serious breaches of the code, or a persistent repetition of behaviour which the trustee has previously been warned about.

Examples of extreme serious breaches include:

- Grossly indecent or immoral behaviour – sexual/racial abuse,
- discrimination, harassment or bullying.
- Dangerous or violent behaviour.
- Incapacity caused by medication/drugs/alcohol.
- Falsification of expense claims.
- Theft.
- Malicious damage.

A trustee will cease to hold office if he/she is:

- Disqualified by virtue of section 72 of the Charities Acts 1993. e.g., criminal conviction, bankruptcy etc.
- Incapable of administering his/her own affairs.
- Absent without the permission of the committee from 3 consecutive meetings.
- Bringing the u3a into disrepute or behaving in a way which is prejudicial to the u3a.
- Failing to abide by the terms of the constitution or the decision of the committee.

9. General Data Protection Regulations 2018

Weston U3A Data Privacy Statement

The above EU legislation came into force on 25th May 2018, and enhances and extends the existing Data Protection Act 1998.

Weston u3a is a 'not-for-profit organisation' and therefore is exempt from being required to register with the Information Commissioner's Office as a Data Controller or Data Processor.

However, Weston u3a has always operated within the spirit of the existing legislation and will continue to do so with the GDPR 2018. The Committee of Trustees act as Data Controller and Processor.

The Weston u3a lawful basis for processing personal data about its members is based on Article 6 of GDPR being:

Legitimate interest: the processing is necessary for our legitimate interests or the legitimate interests of Third Age Trust (TAT).

The personal data of members recorded and held is - Membership Number, Title, First Name, Last Name, Postal Address, e-mail Address, Landline and Mobile 'phone numbers, HMRC Gift Aid, to enable Weston u3a to maintain a register of members, to communicate u3a information, to record membership fees, to facilitate distribution of Third Age Matters (TAM) and Sources publications, and to enable application for Gift Aid from HMRC.

Weston u3a has not used "Consent" as its lawful basis as "Legitimate Interests" is more appropriate and less onerous for members and trustees who would have to maintain a register of consent. However, all members have consented in their application when initially joining the Weston u3a to have their personal data recorded.

The Weston u3a committee of trustees take the security of members personal data very seriously.

E-mails sent to members from Weston u3a are not marketing e-mails, but u3a information about trips, events, or general running of the organisation, and therefore do not require specific consent from members to receive such e-mails. However, if any member no longer wishes to receive e-mails from Weston u3a – they should unsubscribe by writing to weston.u3a@gmail.com

10. Health & Safety

Weston-super-Mare u3a aims to provide and maintain safe and healthy conditions and environments for all members, including during group meetings, lectures and events. Where members are doing u3a activities on their own, e.g. setting up for a meeting, they must ensure someone knows they are and when they are expected back and carry their mobile phone to be able to obtain help in the event of an accident. They should avoid working at heights and lifting/handling heavy items.

EXPENSES

1. Expenses whilst on u3a Business

The car (petrol and diesel) allowance is set at 45p per mile.

2. Weston super Mare u3a - Method of Operation - Funding Policy

Different methods of funding the activities of this u3a have been considered by the committee, and it was decided that there needs to be a “modest” annual subscription. Groups are formed to promote educational, cultural, recreation and other interests, and there is no limit to their number.

A member may belong to any number of groups. Some groups meet in the homes of leaders, and others meet in halls or other suitable locations. For these, hall rental is paid from central u3a funds, and each participant pays a fixed amount each time they attend.

Requests by Group Leaders for the purchase of equipment, or other items, must be submitted to the Weston u3a Treasurer, where they will be considered as part of the general operation of the u3a and its groups.

Members with ideas for the formation of new groups should discuss them with the Group Co-Ordinator on the u3a committee. Existing Group Leaders should do the same if there are any problems arising with attendance at their Group meetings.

3. Group Payments for Halls

The aim is that contributions from all groups using halls, when added together, will cover 70% of the total rental costs. Individual groups may, or may not, be able to achieve this level individually, and any deficit will be covered by u3a funds.

Because of the varied nature of activities, some groups bring in more, and others less, than this percentage which is an average not a mandatory figure. However, sometimes hall rentals may become excessive for a particular activity, in which case the group will be encouraged to find a cheaper location.

4. Lecture fees

The Lecture Coordinator can offer for the u3a to pay up to £100 to ensure the quality of proposed speakers, but we do not pay u3a members. Legitimate expenses can be reimbursed to a speaker who is a u3a member.

GROUPS

1. Accident Report Forms

The Third Age Trust (TAT) recommends that all Group Leaders should fill in Accident Report forms when any accident occurs. These are available from the website or Secretary, and should be returned to him/her via the Groups coordinator as a record as necessary.

2. Contracts Signed on Behalf of the u3a

All activities, whether organized by an individual or a small subcommittee, must be approved in advance by the main u3a committee. Where there are any contracts or agreements they must be signed by a trustee on the committee on behalf of, and in the name of the u3a. In addition, all financial arrangements must be overseen by the Treasurer on behalf of the committee

3. Dogs and Wheelchairs

The Third Age Trust advice on admission of “hearing dogs” kept by members of groups meeting in private homes is that if it is impractical to have them, the host may refuse, as with wheelchairs.

4. Important Guidelines for u3a Group Leaders

Trustees elected at the AGM are responsible for all financial affairs of the u3a, including those of Groups. Leaders are asked to ensure that all who attend are paid up current members of our u3a. Group Leaders are responsible for the running of their group; generally, members decide jointly how their group "works".

Visitors may participate once only for a “taster” session. This single visit is covered by u3a insurance.

There are special arrangements for members of neighbouring u3a’s joining our groups. (See Section 6)

Group Leaders will complete and sign a group registration form provided by the Groups coordinator. They should appoint an assistant, if possible, to run meetings in the Leaders absence or notify members that a meeting is cancelled.

It is essential to keep an attendance register, with attendee names, membership numbers, phone contact details and dates of meetings. Group Leaders must return it to the Treasurer 3 times a year, Christmas, Easter and end July. Group Leaders must notify the Groups Co-Ordinator of membership changes as and when they occur, including deleting members details when they leave a group.

For anything Group Leaders want to do as a group, involving more than coffee tin money, in the first instance they should contact the Groups coordinator, who will be happy to advise.

Group Leaders should not hold too much cash. The insurance limit for the whole u3a is £300 held in members’ homes, and £1,000 u3a cash in transit, and at hired premises.

When a hall or room is hired by a Group Leader, group members (except the leader) who attend pay a contribution towards the cost currently £2 - which should be collected by the Group Leader or, if easier, by a group member. This money must then be paid by bank transfer or to the Cashier at Tuesday coffee mornings, preferably by cash, or cheque, and a receipt obtained. More details can be obtained from the Treasurer.

Members may pay an additional fee to cover refreshments and any incidental costs, whether they meet in homes or hired halls.

Before Group Leaders book a hall, they should check that the owners themselves have adequate insurance, a fire certificate, Health and Safety arrangements and Performance Licenses if needed. Group Leaders also need to ensure they know the hall's postcode in case of emergency. They should inform hall owners in adequate time if they do not require a hall on a particular date.

The Treasurer's approval for hire charges which will be incurred must be obtained before confirming bookings. Invoices for hall hire should be sent directly to the Treasurer.

It is the Group Leader's responsibility to let the hall hirer know any dates when they will not need the hall.

Group Leaders should familiarise themselves with the terms and conditions of hire.

Details of any accident or incident should be recorded immediately. The u3a has Accident Forms (to be completed as soon as possible and returned to the Groups coordinator) a copy of which can be downloaded from the Group Leaders' pages on our website (www.u3aweston.org.uk). A printed copy is obtainable in the back of the Red File at coffee mornings.

All group leaders should be aware of and take action as necessary regarding:

- a. Health and safety issues relating to their groups.**
- b. Copyright issues where applicable.**
- c. The various insurance policies members are covered by.**
- d. Any matters which might bring the u3a into disrepute.**

For further information or clarification please contact the Groups CoOrdinator.

5. Insurance for Members Who do not Renew on Time.

Third Age Trust insurance allows three months grace for members to renew their subscription after the end of the membership year.

6. Weston u3a Policy on Members of Other u3a's joining Our Groups

For many years there has been an agreement with all the other u3a's in the Northern Somerset Association (NSA) of u3a's (except Bridgwater who opted out) to allow their members to join ONE of each other's groups. If any such member wants to join more than one of our groups they must pay the Weston subscription, less the Third Age Trust affiliation fee part of it. If there is a waiting list for our groups then Weston members take priority.

When such members of other u3a's in NSA join a group in Weston u3a, and attend its meetings, they should pay the meeting fee applicable at that time, whether held in a hall or a private home.

Members of u3a's outside the NSA may not join any of our groups without joining Weston u3a. However, potential members of Weston u3a or visiting members of any other u3a may attend ONE meeting of a group(s) on a trial basis without paying our subscription, but should pay the appropriate fee for that meeting.

7. Weston u3a Policy for Safeguarding Vulnerable People

Weston-super-Mare u3a recognises its responsibility to safeguarding the welfare of members involved in its activities. This policy provides advice to the group organisers and specifies good practice guidelines to be followed by all members.

Weston-super-Mare u3a follows the Third Age Trust governing body policy of providing equality of opportunity to all members and potential members, regardless of social standing, language, ethnicity, gender, orientation and educational background. All reasonable efforts will be made to facilitate membership for vulnerable people (as defined in the Home Office document "No Secrets" published March 2000) who wish to become members. If required, membership will be extended to carers not meeting Third Age criteria.

The key principles of the Weston-super-Mare u3a Safeguarding Vulnerable People policy are:

- a. The welfare of a vulnerable adult is paramount to any other considerations.
- b. All participants, regardless of age, gender, disability, race, faith, culture, language or sexual identity have the right to protection from abuse or harm.
- c. All allegations or suspicions of abuse, neglect, harm and poor practice will be taken seriously and responded to swiftly, fairly and appropriately.

Any such allegations or suspicions should be reported immediately in confidence to the group leader and Groups Co-ordinator who acts in the role of Safeguarding Officer on the Committee to initiate formal investigation under the Weston-super-Mare u3a disciplinary policy.

As a provider for people no longer in full time employment, children are not normally involved in our activities. However, they may occasionally be present when accompanying one of our members. In this case, the member must be with the child at all times, and is responsible for the welfare of the child. In such circumstances this policy applies to the child as well as to any vulnerable adults

Weston-super-Mare u3a requires all its members to comply with the best practice guidance below. The following behaviours are not acceptable, will be treated seriously, and may result in action being taken under the u3a disciplinary policy.

- a. Working alone with a child, children or vulnerable adult.
- b. Consuming alcohol whilst responsible for children or for vulnerable adults.
- c. Bullying or humiliating children or vulnerable adults.
- d. Inappropriate or unnecessary physical contact with a child or vulnerable adult.
- e. Having an intimate relationship with any child or vulnerable adult developed as a result of being in a position of trust.
- f. Making sexually explicit comments or sharing sexually explicit material.

GUIDANCE NOTES FOR TRIPS

1. Regulations

- a) Organisers should talk to the Trips Organiser before confirming any bookings.
- b) All monies collected, for deposits and/or balances, must be passed to the Social Account Treasurer once the cut-off date has been reached and the trip is viable. Any withdrawals must be accompanied by an appropriate receipt or invoice after the trip.
- c) All cheques must be made out to Weston u3a Social **Account** and sent to the organiser. Personal cheques may not be used to settle the group's accounts.
- d) **The organiser will not accept any benefit in kind** This means he or she may not:
Accept cash discounts or other forms of payment for Personal gain, but any amounts so offered should be accepted and credited to the account.travel at less than the advertised price.
The organiser should accept any complimentary tickets on behalf of the group and on the understanding that their value is credited to the group account so that participating members receive a reduction in the overall amount they pay.
- e) Children under the age of 18 years are not permitted to accompany adults on trips since they are not covered by u3a insurance.

2. Insurance

The Third Age Trust has obtained insurance cover for all u3a's, to include tour operator's liability insurance anywhere in the UK or mainland Europe. This is not to cover "social holidays" (separate travel insurance is still essential for these), but will enable organisers to arrange approved study trips which involve overnight accommodation.

3. Trip Refunds

When there is a surplus on a trip, refunds should be 50p minimum. The value of the driver's tip is reviewed regularly.

In the event of there not being enough people to make a trip viable, a full refund will be given. After the cutoff date, there can be no refunds, unless someone can

4. Notes For u3a Day Trip Organisers

Financial Matters: are handled on behalf of the Trustees by the Social Account Treasurer. Please liaise with the Treasurer before advertising the trip. If you are making any payment for a trip on behalf of a group of u3a members, you must use the u3a Social Account. Your own bank account should only be used in an emergency.

To work out with you how much to charge per ticket, the Treasurer will need to know the cost of:

- Coach
- Entrance fee etc.
- Driver's tip (usually £25)
- Your own admin expenses.

Break Even numbers: need to be based upon 40 for a coach. (This can be set at lower if you are not expecting so many people, or have selected a smaller vehicle). We have agreed that if there is a bigger take up than expected, and there is more than 50p per head surplus, refunds will be made **on the day.**

When the trip is viable, cheques should be passed to the Social Account Treasurer for banking. The Treasurer will then issue to you cheques to pay costs. You can then issue tickets.

Contact Details: Trip organisers must maintain a list of contact telephone numbers for all participants in case of emergency. This must be shredded at the end of the trip.

Waiting Lists: need to be kept when trips are full in case of cancellations.

Coach Companies: Bakers Dolphin (01934 415000) is the preferred coach company. Blakesley are used for holidays.

Contracts: when you sign a “contract”. e.g. for coach booking, you are acting on behalf of the Trustees.

Pick Up points: starting from Locking Road Coach Park travelling north - Farm Foods, Esso (was BP) Garage and Food Warehouse (was the X1) bus stops.

Tickets: It’s a good idea to include the chosen pick-up point as a reminder on the ticket (if issued). Include organiser mobile phone number for emergency contact on the day.

The U3A Newsletter Editor General u3a trips that need to be advertised well in advance in the newsletter, issued only 3 times per annum. The editor needs the adverts on the template described below (amended as appropriate) and sent to newsletter.wsm.u3a@gmail.com before the newsletter deadline.

Members may bring guests on excursions, but guests may not come with us more than once per annum because of our insurance.

The Social Account is reported in detail to the u3a AGM, and any buildup of surplus paid into the Main Account at the year end.

Standard Notice to be put in Newsletter:

Weston u3a Day trip to on.....

A day trip has been arranged for u3a members onto
.....(Short description of a few lines only)

.....
The cost of £..., includes

.....
The coach will leave Locking Road Car Park at....., picking up at Farm Foods, Esso
Garage and Food Warehouse bus stops. We aim to return to Weston by approx.

If you would like to go, please send your cheque made payable to Weston u3a Social Account, together with a stamped self-addressed. envelope to (The Organiser).

In the event of there not being enough people to make a trip viable, a full refund will be given. Once the take up for a trip has reached a viable number you will be informed that the event is going ahead. After that notification has been made there can be no refunds unless someone can be found to take your place.

Applications will be dealt within the date order of receipts.

Weston U3A Day trip toon.....

I should like to apply for tickets

Name(s) in capital letters

Telephone email Address..... I enclose my cheque for £....

Made out to Weston u3a Social Account

I should like to be picked up at

I enclose a s.a.e.

I am/we are members of Weston u3a

I am/we are guests and understand that I/we may only go on one u3a trip per annum.

Signed..... Dated