Policy – Trips and Events

Introduction

Whittlesea U3A Inc. has a number of trips and events which are organized for members with similar interests

Purpose

This policy applies to any trips and events which are organised by WhittleseaU3A Inc.

Policy

This policy applies to any trips and events which are advertised formally through Whittlesea U3A Inc.

Procedures

1. Whittlesea U3A will ensure that as part of the enrolment program all trips and events will be included on the class program and members will need to enroll on the system as normal, either on line or assisted through the office.
2. Whittlesea U3A Inc. will collect all payments for these trips and events
3. Whittlesea U3A Inc. will place collected monies into a Whittlesea U3A Bank account nominated for this purpose. Payment for these can be completed through:
   - the office
   - in the mail
   - through PayPal (if available)
   - directly to the Treasurer
   - the leader/organizer who will give all money to the Treasurer/Office
   - EFT
   - deposit into Whittlesea U3A bank account
4. Whittlesea U3A Inc. will provide the leader/organizer with an advance, at set up time, to purchase items prior to the event. This amount of cash will be agreed to by the Committee of Management and accounted for on finalization of the trip/event bookings. It is essential that receipts are kept for all purchases.
5. Whittlesea U3A Inc. will provide, in the case of longer or more expensive trips or events, a system for a member to make progressive payments.
6. As with other Whittlesea U3A Inc. events withdrawal from the activity will need to be completed either online or through the class coordinator and within the time specified by the leader/organizer.
7. If a member wishes to withdraw from the event after the cut-off date the member will lose their payment unless there is someone else who can replace them. Individual cases may be reviewed by both the leader/organizer and Whittlesea U3A Inc. President for discussion.
8. Whittlesea U3A Inc. Committee of Management will liaise with the leader/organizer of the activity, to work out the cut-off date for payments.
9. Whittlesea U3A Inc. Grants Officer needs to be advised of any sponsorship needs for a trip. The Grants Officer will work with the leader/organizer and the organization involved to provide the sponsorship

10. When a big event/trip is organised (longer than a single day) through Whittlesea U3A and money is required to be collected by Whittlesea U3A, the Committee needs to approve the pre-planned event/trip prior to that event being listed in class calendar"

Responsibilities

1. Whittlesea U3A Inc.'s Committee of Management is responsible for:
   - developing, adopting, implementing and publishing this policy
   - collecting and banking all monies relating to the event as outlined in the policy
   - payment of invoices submitted by the leader/organizer of the event as part of that event
   - ensuring that enrollment of the event is maintained as part of the class courses guidelines
   - ensuring members have equal rights with regards to participation in the trip or event

2. Whittlesea U3A Inc.'s Secretary is responsible for:
   - receiving enquiries about this policy and complaints about a potential breach of this policy; and,
   - for bringing a complaint before the Committee of Management for investigation and resolution

3. The trip/event leader/organizer, in liaison with the course coordinator, is responsible:
   - to provide all details necessary to the smooth organization of the trip/event to the Committee of Management at the time of advertising
   - for the organization of the event including all elements stated in the itinerary
   - for the provision of all accounts to the Whittlesea U3A Inc.'s Committee of Management for quick payment
   - for ensuring all members have equal rights under the guidelines as set out for the management of classes and courses

Authorisation

This Policy was reviewed by the Committee of Management of Whittlesea U3A Inc., and minuted as such on the 11th of May 2026

This policy will be published by the Committee of Management of Whittlesea U3A Inc. on its website within 4 weeks of the date of this authorisation.

Policy Review

This Policy will be reviewed at least annually or when circumstances change.