

**For a successful event you need to achieve the following:-**

- An organising committee with agreed terms of reference
- A venue with lecture rooms and accommodation
- A date which does not conflict with any major U3A event either locally or nationally or bank holidays
- A sufficient number of tutors willing to teach a subject
- An interesting range of subjects
- Sufficient interest from potential participants
- A realistic final price.

**Venue**

Decide date range and search accordingly. Many popular venues are booked from year to year, so you need to plan at least 12 months in advance and preferably more.

**Ideal Requirements**

- Single ensuite rooms
- Compact and level campus, suitable for people with mobility problems
- Lifts in both teaching and residential accommodation
- Good accommodation and teaching facilities for the disabled
- Good transport links and plenty of convenient parking
- A suitable auditorium/hall for evening entertainment
- Competitive prices with no hidden extras.

**Important considerations for site visit**

- Ask to see a typical seminar room and bedroom, the dining room, bar and reception area
- Find out whether other groups will be using the facilities at the same time. Foreign/language students can be noisy, particularly at night and in dining areas
- Investigate the capacity and layout of the seminar rooms (i.e. fixed seating tiered lecture theatre, chairs and tables, range of different sizes, the potential to change the layout)
- Check the audio-visual provision in each seminar room and be sure what is included in the price. Equipment hire can be expensive. Also establish to what extent tutors can bring in their own equipment and link it to theirs.
- Ask where the delegates will have mid am/mid pm refreshments?
- Check the capacity of the dining area. This is very important as day delegates will swell the numbers at lunchtimes and increase congestion and queuing. More than one sitting will be difficult and unpopular.
- Ask whether U3A members will have a special dining area?
- Find out where the check-in will take place and make sure there is plenty of room for people and luggage.
- Discuss where the 'rolling' refreshments will be served during registration
- Establish a good place for the U3A Organisers' to be based for the duration of the school so that members know where to find them. A couple of tables and notice boards are a minimum requirement.
- Can they cope with welcome drinks and a gala dinner?

If the site meets most of the above criteria (no venue is ideal!), get a formal quotation from the Conference Organiser, which includes all the extras e.g. welcome drink, gala dinner etc. Ask the Conference Organiser to hold provisional dates whilst tutors are recruited. Check the cut-off date for booking confirmation and get a schedule for deposits/staged payments. Check when you have to declare your final numbers (hopefully no more than 14 days before event) for which you will then be financially committed.

**Useful additions**

- A few double ensuite rooms can be useful
- Possibility of people staying pre and post school
- Food/drink facilities available on site pre and post school
- Medical centre open on weekdays
- Onsite shop for newspapers etc
- Cash point
- A college mini-bus which can assist with the transfer of people from local stations.

### **Tutors/Programme**

The term tutor is the most easily understood but it does not imply that chalk and talk is the favoured method; participant involvement should be encouraged. However, you must do all you can to ensure good quality tutors and it is essential that they prepare detailed course descriptions which you in turn feel will be of interest.

At the national summer schools organised by the Trust all the tutors are U3A members who receive expenses only. It is difficult to find professionals who will work on that basis but not impossible.

In the event that you decide to pay tutors a fee commensurate with their services, you must bear in mind that your public liability insurance will not cover this situation and therefore you need to ensure that any paid tutor has public liability insurance up to £2 million and can produce a current cover note for your files. In addition you need to ask for a letter confirming that they are registered self employed for tax and national insurance purposes and quoting their national insurance number.

### **Subjects and programme**

It is better to concentrate on a specific area or topic as it makes the studying more focussed. It makes any subject more interesting if visits can be arranged to local sites and coach travel etc should be included in costs.

A typical programme could be:

**Day 1** - arrival pm and check in/late afternoon/welcome and introductory talk for each course/dinner.

**Day 2** - sessions am and pm/outside visits/dinner/entertainment.

**Day 3** - sessions am and pm/outside visits/gala dinner.

**Day 4** - final session am/lunch and depart.

### **Participants**

The school can be designed for local regional/network participation but can be broadened at any stage. The National Office can aid any dissemination of the information.

### **Entertainment**

Ideally local U3As will be able to help arrange entertainment such as lectures on local history, local music groups etc. In addition it is nice to have a Gala Dinner on the final night.

### **Pricing**

Clearly the cost of all accommodation, meals, hire of rooms and tutor expenses must be covered, plus any extras e.g. outside visits, gala dinner and/or entertainment. Bear in mind that lecturers may need to stay an extra night pre and/or post school if available. It may be helpful to have a list of local B & Bs as a fall back.

On the question of VAT, unless the venue is not registered which is extremely unlikely, VAT will be added to all food, drink and accommodation costs. There are, however, some venues which will provide seminar rooms and lecture theatres VAT free.

When arriving at a final price, it is good practice to add 5% or similar as a contingency allowance.

You must calculate the minimum number to cover all fixed costs. The venue will frequently want a formal commitment to minimum numbers well in advance and this must be handled very carefully as any guarantee could leave the organisers exposed (see page 1). The Trust is willing to assist in this process.

### **Volunteer Help**

It is vital to recruit local help from the nearest U3As to provide welcome staff upon arrival and aid transit from stations etc. Plan this well in advance.

### **Conclusion**

The guidance provided in this advice sheet is based on the way the Trust organises its national schools and it is hoped that it will be useful to you if you are thinking of arranging a residential event. In addition, some of the points will be equally applicable to a study day.