

Explanation of Activity Checklist and its' usage, 2026

The rationale behind our own format was to try and reduce the amount of paperwork convenors need to deal with for meetings.

The personal RA section (formerly a standalone document) was specifically introduced by the Trust as a response to Covid-19, however we wanted to future proof that concept beyond Covid-19, and our local review panel felt the format would be better incorporated into the new activity checklist.

Clear demarcation of the separate elements of the form has been achieved by separating them from each other.

It is stressed that these activity checklists are intended as an aide memoire only, and as an indication to group members that these are the aspects that are considered when planning a visit.

Once issued a copy of the appropriate Activity Checklist can be found under the individual Group on the Groups tab of the website, and please be aware that some groups may have two.

For some groups that use or duplicate walks or rides, once the initial visit is concluded it's entirely up to the convenor as to what to do with the checklist. It may be that if the group **were** likely to re-visit at any time, then maybe keeping it may be useful – had any specific remarks been made, for example.

Emailing the checklist to members – this may be sent only once to current members of the group, with a rider to explain this is the checklist that will be used for any/all visits. No-one is expecting members to print these off unless they particularly want to.

However, **convenors must remember** that new members will need receipt of the form prior to their first attendance or once they have been accepted as full members of the group.

For those members without access to email please have printed copies available.

NB: Some groups who are due to visit separate public venues may wish to send a new/relevant copy to their members prior to any visit.

Should an incident occur then it may be prudent to attach a titled and dated copy of the activity checklist to our U3A Incident form, which would need to be completed either at the time or on your return and passed to the committee for recording, along with your register of all attending members. This needs to be done within 7 days please.

Please be assured that should an incident occur, you would not be liable for any such incidents while at a venue, the liability is theirs not yours or ours.

The generic Activity Checklist is adapted for various venue scenarios covering the following:

Private Houses

Public Indoor Venues

Single Visit Indoor Venues

Public Outdoor Venues

For some of our groups specific Activity Checklists are devised, again using the generic form as a guide, with relevant sections added:

Cycling

Walking groups

Motorcycling

Walking Netball

All of the variations were formally introduced in April 2022 and have had reviews in 2024 and 2025. It is anticipated that convenors will be asked to participate in future reviews of their respective checklist along with a Group Co-ordinator, as required.

Any striking changes will need to be incorporated into the original template moving forward. This will then need to be sent to our DPO & Policies Officer for re-issue.

As with any documentation a review of such can be done before the renewal date if the checklist is no longer appropriate for any group and re-issued accordingly, again this would need re-issuing via our DPO & Policies officer. Currently please contact Penny Brighten if this is the case.

Penny Brighten, DPO & Policies,
Garforth, Kippax & District U3A