



TRIP LEADER MANUAL

I. Introduction

Dear Trip Leader:

On behalf of the Up The Creek Ski and Recreation Club, we would like to thank you for your contribution to the success of this event and our Club. Group trips are a fun way to share your interests with others in UTC and we'll to our best to assist you wherever we can. In appreciation for your time and effort, your trip is complimentary. The following information will assist you in planning and conducting a successful trip. All forms listed in this manual are available in both hard and electronic copy. Ask your Chairperson for any additional supplies you may need. Thanks again & HAVE FUN!

II. Fact Sheet

If the Chairperson is assembling an itemized breakdown of the trip components for you, then you will receive a completed Fact Sheet detailing all vital information of the trip. However, if you are working with the details, please complete a Fact Sheet for the Chairperson. This will help the Chairperson in the rare instance that you cannot complete running the trip for any reason (transfer, illness, etc.).

III. Trip Pricing

Typically, the Chairperson will price out the trip with you or with your help. Please remember that value is a big concern for most of our members. The Trip Cost Proposal form will be provided to you for reference and budgeting. Please fill out the Trip Cost Proposal to present to the Chairperson & the Board if requesting to do a trip on your own or if a one hasn't been completed on a tentatively scheduled trip. This is a big help to the Board & Chairperson, and proposals are required before they can approve a trip.

The advertised price is derived by adding the net cost amounts (including tax), projected expense breakdowns such as a group party, snacks, or other side events, the trip leader(s) complimentary amount, and a nominal (6-9% to cover credit card fees, unforeseen costs & help supplement other trips that have been done at a loss) markup margin. The markup margin is mandated by current board policy to cover unexpected expenses such as empty bus seat/lodging space charges or cancellation fees, charge card fees, etc.

A non-member trip price is calculated with a markup margin also mandated by current board policy.

If your trip work load requires more than one person to effectively run it (generally, based on the number of members going) you may recruit an assistant trip leader based on board approval. Assistant trip leaders receive ½ comp value of the trip.

IV. Promotion

You are responsible for the promotion of your trip. Consult your Chairperson for suggestions and your promotional start date.

The most common, effective and economical advertising method is the use of fliers. Trip flier distribution and verbal presentation at each general membership meeting proceeding your trip are expected.

When designing your flier, remember to include the advertising basics:

WHO – use a UTC Club Logo (available off of the Web page or from a Board Member)

WHAT/WHERE – type of trip or destination in bold type face

WHEN – dates (and time if applicable)

PRICE – member and non-member prices

PACKAGE INCLUDES – ex.: # of nights lodging, # of days lift tickets, group activities, transportation, all taxes

HOW – contact person(s), phone numbers, email addresses (home address optional)

To assist you with flier design, the Club can provide you with logos and computer clipart if you don't have access to any. The resort will often offer assistance such as supplying posters, property or area brochures, trail maps, and their logos. You may wish to call their marketing department and ask them to mail out a "press kit" or computerized graphics. Check with the Chairperson for any previously designed fliers for the same trip.

You may want a board member to review your master flier before going to print. Select an attention getting color, preferably one that is not simultaneously being used on another trip flier. 20 lb. paper stock is most commonly used. On trips that have very few promotional facts, consider designing a half page flier, thus decreasing your printed cost by half.

Once the flier is completed, provide an electronic copy to the Web Site coordinator by either email or floppy disk. The Newsletter Editor also needs a couple of paragraphs describing the trip for the Kickoff Newsletter. Please provide the necessary information to the Vice President for inclusion on the hotline as well.

V. Registration

You are to be present at each general membership meeting to accept sign ups for your trip. If you are unable to attend a meeting, designate your assistant or reliable substitute who is familiar with your trip.

Anyone registering for a trip must pay a deposit if the trip is greater than \$100, or the full amount if it is equal to or less than \$100 at that time. Never accept any name for a trip without them submitting the appropriate payment.

Enclosed is a "Registration Form" which is designed to keep you organized. The following explains its usage:

- 1) The first column is to keep a running count of the members signing up.
- 2) Record the membership number in the second column. You must verify their name against a current membership print out which is available from the Membership Chairs. **THEY MUST BE A CURRENT MEMBER AT THE TIME OF THE TRIP, AS WELL AS WHEN THEY SIGN UP FOR THE TRIP, TO GET THE MEMBER PRICE.**
- 3) The Name column has room for an address if you believe you will need to mail them something, or get their e-mail address if you have the access to use it.
- 4) Record both home and work phone in appropriate columns.
- 5) Record any roommate preferences in appropriate column. Never guarantee any specific roommate arrangement or unit type. Unexpected changes do occasionally occur.
- 6) Record the date and amount of deposit received in the first of three areas in the "Payment" column. At later dates, record any additional payments accordingly.
- 7) The last few columns are for optional information such as smoker or non-smoker, if they have signed the Refund/Cancellation Policy and Liability Waiver Agreement, or if they have received an itinerary from you.
- 8) Record people that are on wait list and any cancellations on the same form.

When the trip sells out consult the Chairperson regarding the possibility of securing more space or keeping the trip size as it is.

VI. Deposit Listing Form

At each meeting, the Treasurer will issue you a "Deposit Listing" form and a blank envelope to use for monies received at that meeting.

You will find that some of the requested information is also on the registration form, as discussed on the previous page. Please complete it anyway. Record member number, name, and in appropriate column, the deposit amount and type of deposit (cash, check or credit card). The reference column is to indicate the personal check number or any other information you feel the Treasurers need to know (i.e. board members using comps, etc.).

If the individual has no preference in paying by cash, check or credit card, suggest cash or check, as the Club must pay up to 5% per credit card charge. If a credit card or cash is used, send the individual to the Treasurer to process the charge slip or to issue a

cash receipt. The participant will bring both credit card charge slips or a cash receipt for your deposit into the deposit envelope, and to document on listing & sign-up forms. Comp slips being redeemed must physically be turned in at sign-up to be used for a trip. Treat comp. slips like cash and accept only comp slip for the amount of your trip, if changes need to be made please send them to the treasurer.

The Deposit Listing form is a carbonless duplicate form. Once completed, retain the second page for your own records, then enclose the top copy in the cash envelope and hand deliver to the Treasurer at the end of each registration session. You will receive a new set each time.

VII. Refund/Cancellation Policy and Liability Waiver Agreement

The Refund/Cancellation Policy and Liability Waiver Agreement is an important document to be signed by all trip participants. This form details the trip name, dates, payment schedule, cancellation policy and liability release agreement.

Have the trip participant sign this form at the time of initial registration. Remember to indicate on your registration sheet that they have signed this form. After trip completion, give all signed forms to your Chairperson to file.

VIII. Refund Procedure

By signing the Refund/Liability Release Form, the trip participant agrees to specific cancellation penalty terms. If someone wants to cancel or find a replacement, remind him or her of the following terms:

- 1) You (trip participant) are liable to lose all monies paid toward trip regardless of reason.
- 2) Refunds will be issued, when applicable, 14 to 30 days following the trip.
- 3) Your paid trip is transferable and therefore you may sell it to another person with no forfeiture of funds. Note: Monies exchanged will be between the two persons without Club financial involvement. Documentation from the person selling his/her trip (as to whom the trip was sold to) must be provided to you the trip leader. Please save it for future reference.

IX. Rooming List

Some thought and consideration must be used when charting rooming assignments. The best way is to request layouts of each room from the hotel/condo and have each participant sign up their name on a particular bed on a first-paid, first-choice basis. Otherwise, unless requested, try to assign men with men and women with women. As indicated on your Trip Registration Form, you should also try to put smokers in their own room(s).

Understand how to maximize unit occupancy. In condominiums, you can place a person on a sofa sleeper in the common area; that is, not everyone gets the privacy of a

bedroom (you can price trips differently for those people). Though trip prices are advertised based on maximum occupancy per unit, you may want to have the option of paying an extra surcharge to cover the cost of a private bedroom. For example, someone may not want another person sleeping in the same bed, or a couple may not want another couple in the same bedroom. Whatever the situation, they may wish to pay extra for this "empty space charge". This space charge value is the per person amount times 10% of the hotel charge, as listed on your Trip Analysis.

Submit a completed rooming list to your lodge representative by phone or mail by the specified date. Keep them informed of any roommate changes. If several changes occur, please rewrite or retype the rooming list and resubmit it.

Unless the group receives a copy of the assigned unit numbers upon arrival, they will have to continually consult the front desk to determine who is in what room. The property may or may not provide a copy of the group rooming list for everyone's room. Find out in advance if they will provide this for us. If you are going to handle this, be aware that occasionally the property will know the designated unit numbers in advance of the group arrival. In this case, you can make rooming list copies in advance so that every room will have one. Condominium units sometimes have direct phone numbers, which are available from the property Management Company, in which case you should list both unit number and phone number.

X. Bus Transportation

Call the tour operator or Bus Company one-day prior to original departure to reconfirm departure time and location. Be aware that sometimes the bus driver prefers to load luggage and equipment in the lower storage pays instead of the travelers doing so.

Before the bus departs, check off the passengers on your master list to see if you are missing anyone. Have your registration form on hand should you need to phone someone. Do not inconvenience the entire group by waiting too long for just one or two late persons. It is their responsibility to be present if they had received a flier and/or itinerary clearly stating the departure information.

Also, before departing, the bus driver may request a \$50 refundable cleaning cash deposit from you. You may request this cash amount from the Treasurer before the trip. Usually, this deposit is to be returned at the end of each one way drive, providing the bus is reasonably clean of garbage, etc. If the driver insists on temporarily retaining the deposit, then note his name and get his verbal approval of the bus condition before he departs from the drop off point.

Most buses have a PA system. The driver can show you how to use the microphone. At the start of the trip, announce the following items:

- 1) Welcome the group, introduce yourself (and assistant)
- 2) Introduce the bus driver
- 3) Estimate arrival time (ask driver)
- 4) Advise the group to use the trash bags for their garbage
- 5) Other relevant info, snow report, itinerary, etc.

It may help to occasionally pass a trash bag up and down the aisle during the drive. To avoid loss of our cleaning deposit, pick up remaining garbage at the end of the drive.

Upon arrival, you may determine your key and lift ticket distribution procedure. If everything is already packaged and ready at the front desk, it may be easier to handle this while everyone is still on the bus.

Once the bus is cleaned, thoroughly check both overhead racks and below seats for any items that were left behind. Before the bus driver leaves the group, remind driver of return departure time.

The driver is providing a service to our group. If the driver has done a great job with the group, you should pass a hat to generate a tip. Remember, we tend to use the same companies over, so make sure they are happy too.

XI. Van /Auto Rental

You must accept the optional insurance coverage for each rented vehicle. Designated drivers agree to not operate vehicle during or following consumption of alcohol or drugs.

Shop around to compare rental rates. If you use a 15-passenger window van, do not ride more than 11 passengers with ski equipment and luggage.

XII. Trip Itinerary

If your trip requires explanation of written details, you will find that an itinerary will save you time from answering the same question repeatedly, as well as lessen any uncertainties among your participants. Informed participants will help insure you of a smooth running trip.

An itinerary is an essential source of information that should be completed several weeks prior to the trip. A convenient time to distribute this itinerary sheet might be at the time of their final payment or at the last meeting prior to the trip.

Consider some of these items in an itinerary:

- ◆ Denver departure date, time and location
- ◆ Is food and beverage provided during outbound and return drives?
- ◆ Route directions/lodging location map for car drivers
- ◆ Lodging property name and phone number
- ◆ Property amenities (jacuzzi, pool, etc.)
- ◆ What to bring
- ◆ Details of local shuttle pick-up location, frequency/times
- ◆ Details of any planned group function or group rendezvous, and bad weather alternative site
- ◆ Morning check out time on departure day
- ◆ Luggage storage instruction on check-out day.
- ◆ Destination departure date, time and location
- ◆ "Estimated" return time to Denver

XIII. Member Conduct

As trip leader, you have the responsibility and authority to remove any participant from your trip you may be highly offensive or injurious to others. If necessary, call local police to handle serious problems. Report any such incidents to the Chairperson after the trip at which time the Executive Board will proceed with the inquire/hearing to determine censure, suspension or expulsion of member from the Club.

XIV. Expenses

For expenses you are unable to cover for any reason, please submit a check request form. You can obtain a Check Request forms from the Treasurer. If possible, pay for all smaller miscellaneous purchases personally, and retain receipts for full reimbursement. A check request is also required for your reimbursement. If a cash advance is necessary, you will be asked to sign a Promissory Note.

Consider your appropriate budget as indicated on the Trip Proposal so as not to exceed planned expenses. Often, some food and beverage products are left over from a previous trip, therefore, determine existing supplies before you shop for your trip.

Return all monies of cash or checks to Treasurer at next General Membership Meeting.

XV. Club Property

All Club owned property (i.e. Volleyball Nets, cooking utensils, large coolers, water coolers, boom box, etc.) is stored in a Storage Locker, located at 5080 Leetsdale, Unit C-208. Contact any Chairperson for access. A current list of inventory can be obtained from the Secretary.

XVI. Trip Closure

- 1) The following is to be submitted to your Chairperson within fourteen (14) days after trip or prior to the next Board meeting, whichever comes first:
 - ◆ All refund requests from cancellations
 - ◆ Completed Trip Financial Summary report with receipts
 - ◆ Copies of all fliers, itineraries, maps for files (used in following years)
- 2) Advise Chairperson of any remaining food and beverage items.
- 3) If you used any Club Property, after cleaning it, return it to the locker or forward it to the next trip leader as instructed by Chairperson. Report any lost or damaged Club property items. If you used ice chests or coolers, please allow the inside to thoroughly air dry prior to closing lids.
- 4) Present a brief verbal recap of trip at next General Membership Meeting
- 5) Provide the Club Newsletter Editor with a brief trip highlight article and pictures for an upcoming issue or the Web page.

