

## Day Trip Guidelines for Committee Members 1 - 7; for Committee Chair 8 - 12. March 2024

1. New to Day Trips: New members are expected to attend the monthly meetings. They are encouraged to assist another experienced member in the planning of a trip before attempting to plan one alone. A self-drive trip is a good way to ease into all the details that are required to plan a day trip. It is not uncommon to attend meetings for 6 months before helping out.

2. Planning a Day Trip Using an Event Worksheet Form: Go to the ALL website [Uwp.edu/ALL](http://Uwp.edu/ALL). Click on the Day Trip box and scroll down to find “Day Trip Forms”. Open the box called “list of forms” and open the *New ALL Daytrip Event Worksheet* (fillable). This form will help you organize all the trip’s details in one spot. On completion, email a copy to the chair of Day Trips. Every trip requires a completed Event-worksheet. (**See sample Event Worksheet**). *NOTE*: We are a tax-exempt group and do not pay state taxes in WI and IL. We will supply our tax-exempt number to vendors before contracts are completed to avoid being charged state taxes. At a day trip meeting we will check the ALL calendar to make sure the date selected does not conflict with other ALL dates. We will also estimate how many people to reserve tickets/seats for. There are two coach buses that we can reserve: one bus holds 40 people, and the other holds 56 people. If we exceed the capacity of the smaller bus, we may switch to the larger bus. Alternately we may need to return tickets without penalty. That date will be part of the contract.

A **contract** is needed for ticket reservations, whether a down payment is needed, the due dates for the down payment and the final payment. Once the registrations are agreed upon, the contract goes to the day trip chair and the ALL office manager (Vanessa Moravec – Tel: 262-595-2793, email: [greco@uwp.edu](mailto:greco@uwp.edu)). For restaurant contracts identify several menu choices. Use the cost of the most expensive menu item, add beverage, dessert, and gratuity for a “price per person” then multiply it by the anticipated number attending. *An email contract between ALL and the venue with the following info is needed before down payments or the event report is prepared.* Restaurant contracts should include food choices, beverage choices, dessert, gratuity, room rental (if applicable), max/min number of persons attending, date, start time, end time and date the final count to be sent. Venues are paid via credit card (over the phone or in person), and the ALL office manager is the only one who has the authority to pay invoices. The receipts are saved if the payment is made over the phone and then delivered to the ALL office manager. If an email contract is not possible, then an invoice or letter of agreement by the vendor sent to the ALL office manager is needed before a down payment can be made.

**Coach Bus or Self-Drive?** If the destination is within a 30-mile radius of UWP, the trip is self-driving. Carpooling is encouraged and is to be done individually, not through ALL. We cap the number for self-drive trips between 35 – 45 people. For coach bus trips we can offer 40- or 56-person bus. Since COVID, bus trip attendance has been low. Reserving the smaller bus first then switching to a larger bus is easier than the reverse. At the meeting, the trip planner discusses the details of the trip: date, start time, end time and address of the vendors. This information then needs to be in the form of an email and sent to the Day Trip chairman and ALL office manager so a coach bus can be reserved, preferable 3 months prior to the trip date. Later a copy of the bus contract is emailed to both trip planner and chair

to be used in costing out the trip. *NOTE:* If bus travel to a destination is longer than 1 ½ hours allow ½ hour extra for a bathroom stop, preferably to a place with multiple stalls.

**Free Ticket:** The trip organizer(s) will get their trip free of charge; if more than one plans it, they share the ticket and get ½ off. This cost is built into the total charge. Here we add all the expenses for the trip then divide the trip by the number of people we anticipate attending (minus the organizer). That number is then added to the total cost of the trip per person. The bus driver may be invited to share the meal at the discretion of the trip organizer.

**3. Flyer Preparation:** Use Microsoft Word or something equivalent. On the front of the flyer: at the very top of the page (8 ½ x 11) put the ALL name, address and office phone number. Include the full date, depart and return time, bus or self-drive, brief description, photo and the trip leader's name and phone all organized above the horizontal line. Below the horizontal line is the cost (member and guest), food, deadline for registration, and how to register online or mail in a check. The ALL office manager will finalize the links needed on the flyer for food choices and credit card payment. On the back of the flyer include the *schedule of events* starting with the needed arrival time to Tallent Hall for a bus trip or the needed arrival time at venue for self-drive. Include when we will arrive at each location, when lunch begins, and approximately when we return to Tallent hall. After the schedule you will list the name of the restaurant and below that all the food choices. We usually offer 3 choices, one of which is vegetarian. We also usually have a small dessert. Included beverages are usually soft drinks, coffee or tea. If where we eat includes a bar (alcohol), we mention that a *cash bar is available*; however, that drink charge is never part of the meal cost. Co-chairs approve all flyers before they get emailed to ALL office manager, ALL treasurer (Colin) and webmaster. *NOTE:* At the time of this writing (3-24), co-chair Carole S. does the flyers and helps with Event Worksheet reports. (**See sample flyers**).

**4. Registering for a Day Trip online:** After the flyer gets approved by the co-chairs and is sent to the ALL office manager, she prepares it by making the links active for credit card payment and registration. It gets emailed to the ALL membership on the first Monday of each month. After a credit card payment is accepted by the program server, an email automatically informs the ALL member that he/she has registered successfully. An email reminder from the ALL office manager is sent out to the registrants one week prior to the day trip and includes the schedule of events and time to be at Tallent Hall for bus trips or at the venue for self-drive trips.

If Day Trips cancels a trip, a refund is issued. Because it is very costly to issue a refund, we try to avoid cancelling a trip due to weather by avoiding the worst weather months of December and January. *This is our weather cancellation policy:* ALL events will be automatically cancelled when any one of these closures occur because of bad weather: 1. Kenosha Unified School District closes. 2. Racine Unified School District closes. 3. UW Parkside closes. These closings are announced on TV, the Web and the radio so that members can easily determine whether ALL events will be held. In addition, we will email cancellations to the membership and the ALL phone message will also announce a cancellation.

2-22-2018.

See next page

*Refund Policy for Day Trips:* If a member opts out of an ALL Day Trip, a refund will be given if the refund request is made prior to the deadline for signing up for the event, and the member will be refunded the trip cost minus 11% UWP financial services fee and \$5 office support fee. If that ticket is transferred to someone else, it's up to the member to work out payment details and let the ALL office manager know who is taking his/her place before the trip's date. If the member chooses to be refunded, the refund will be issued via original payment method or check at the discretion of ALL. Checks can take up to 2 weeks. 9-12-2023.

**5. Week before the Day Trip:** Trip planner needs to confirm everything: all venues, restaurants and have the office manager check with the bus company to be sure the trip is still on their schedule. Get the bus driver's name and phone number prior to the trip from the office manager, just in case the bus is late or isn't where it should be.

**6. Day of Trip:** Bring the trip's Event Worksheet report with you in case of last-minute changes and to confirm payment totals. If the ALL office manager cannot meet the bus on the day of the trip, make arrangements with her to get items needed at the ALL office, such as green lanyards, clipboard with attendance sheet, lunch slips, UWP/ALL waiver forms, and an envelope for the bus driver tip. Check off the names and give a lanyard to each member that boards the bus. Once on board the bus, take note of how many empty seats as that may be easier than counting full seats to keep track of attendance as you leave each venue. If necessary, call those that have not arrived using the cell phone information on the attendance sheet; also check your own email and phone for possible messages from them. Do not wait more than 5 minutes if you have NOT had any contact with them. Sometimes liability release forms need to be signed by everyone, and the forms get passed around on a clipboard once the bus starts rolling. (These forms need to be signed by members each year.) On the way home, a bus driver tip envelope is passed around the bus. Make sure to write on the envelope "bus driver tip". The trip leader gives the full envelope to the bus driver when the bus has been cleared of each rider and checked over for left behind items. Typically, our office manager is at the bus and helps with boarding details. She also does the credit card payments for the trip's venues. It is helpful to bring the event report for accuracy with totals and payments. If the office manager CANNOT come on the trip, payments can be made by her over the phone. The trip leader is expected to hold onto receipts to give to the office manager after the trip. Communication with the office manager on the day of the trip (via cell phone) is very helpful to keep her in the loop of the trip's progress.

**7. If an accident happens on your trip:** to an ALL member or guest on HOST'S PROPERTY, you will need to let the host know AND **have the host fill out an accident report using their forms AND GET A COPY of it.** The copy goes to the ALL office manager and she forwards it to the UW-Parkside business office.

See next page for Duties of Day Trip Committee Chair

## 8 – 11 are Duties for the Day Trip Committee Chair

- 8. Monthly Agenda:** Committee Chair creates the monthly agenda for the monthly meetings. The agenda is then sent via email a few days before the meeting to the ALL office manager. She will have copies ready for the meeting which she attends. The meetings are held at UWP Tallent Hall in the Orchard room (first room you see when entering the building).
- 9. ALL Board Report:** Committee Chair creates the board report for the monthly board meetings and attends the meetings held on the first Monday of the month except June and December. The one-page report consists of the title, date and brief description of the day trips that happened a month prior and the trips planned for two months ahead. This report needs to be completed the week before the meeting and emailed to the board recording secretary, the ALL Office manager and the ALL webmaster (Jarlene). At the board meeting the Day Trip committee chair goes over the report with the board.
- 10. ALL Points Bulletin (APB):** Four times a year the Committee Chair prepares a report on the Day Trips that have been completed since the last APB report and the ones that will happen in the next 3 months. This report will be done by Dec. 15, for JAN, FEB, MAR; then by Mar. 15, for APR, MAY, JUNE; then by June 15, for JULY, AUG, SEPT, and then by Sept 15; for OCT, NOV, DEC. This two-page report is sent via email to the ALL office manager.
- 11. Annual Meeting Day Trip Report:** The fiscal year for ALL begins in July and ends in June. The Committee Chair prepares a two-page report that is to be sent to the ALL office manager by early May. The report consists of the title, date and a brief description of the Day Trips that were completed in the past fiscal year. The report is then used in the ALL Annual Report at the Annual Meeting held in late June. This document consists of a report from the president, class committee, finance committee, lecture committee, membership committee, publicity, social and focus groups and is available for the membership to review. The report is then put into the ALL archives.
- 12. Annual Meeting Poster Board:** The Committee Chair prepares a *science fair trifold* type poster for the table at the annual meeting held in late June from 11 am to 12 pm. Photos along with a date, title and brief description of the trips done in the past fiscal year are represented on this poster. A committee member is expected to bring this poster board and printed flyers for upcoming trips to the meeting to help promote day trips to new members and guests.

Compiled by Carole Scotese and reviewed by Frances Kavenik - Day Trip co-chairs March 2024.  
Sent to ALL office and ALL president March 2024.