

# **NASA LEWIS SKI CLUB, INC. ACTIVITY COORDINATOR'S GUIDE**



**2005 Version**

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## Introduction

Thank you for volunteering to be an Activity Coordinator for the Lewis Ski Club! This guide describes official Lewis Ski Club Policies as contained in the Club's Constitution and Bylaws for running Club sponsored trips and activities.

## Steps for Running an Activity

### 1. **Organize**

1. Select place and date for the trip.
  - a. Contact the executive board and appropriate V.P. to confirm.
2. Obtain costs of activity:
  - a. Transportation
    - i. Bus/airplane/train/carpool
    - ii. Estimate driver tip, if appropriate
  - b. Lodging
    - i. Double/triple occupancy
  - c. Event fees
    - i. Lift tickets/trail pass/canoe rental etc.
    - ii. Ski rentals
    - iii. Lessons
  - d. Refreshments
    - i. Donuts, danish, fruit, muffins
    - ii. Pizza
    - iii. Group or individual dinner arrangements
    - iv. Water, juice, soda pop, wine, beer (water is strongly recommended for both the outbound trips as well as the return)
3. Prepare estimated budget
  - a. Calculate total cost
  - b. Calculate per person price (for bus trips, planning for a group of 35 is recommended)
  - c. See example on following page

<b>Activity Budget Estimate</b>		
<b>Holiday Valley Ski Trip</b>		
<b>Friday, March 14, 2003</b>		
<b>Gene Addy</b>		
<b>Estimated No. of Participants:</b>	<b>35</b>	
	<b>Unit cost</b>	<b>Cost/person</b>
<b>Bus</b>	\$ 745.00	\$ 22
<b>Refreshments and Driver Tip</b>		\$ 5
<b>Total - Bus</b>		<b>\$ 27</b>
<b>Lift Ticket</b>		\$ 20
<b>Total - Bus + Lift</b>		<b>\$ 47</b>

Quote from Don at Cleveland Southeastern for 47 passenger bus

Quote from Tracey at Holiday Valley (group rates go down on Mar. 10)

## 2. **Advertise**

**\*\* Most important part of running an activity**

**\*\*\* Word of mouth & personal invitations most effective**

1. Create flyer
  - a. Must be reviewed by Publicity Director and Executive Board
  - b. Must include:
    - i. Lewis Ski Club name and logo (skier on Saturn).
    - ii. Description of the activity
      1. include dates, times, and place of departure
    - iii. Cost of the activity
      1. include deposit and payment schedule
    - iv. Activity Coordinator's name, phone number, address, mail stop, email address, etc.
    - v. The Refund Policy must be stated
    - vi. "No Smoking on the bus" statement
    - vii. Statement that checks are to be made out to "Lewis Ski Club, Inc."
    - viii. Club membership is required (for most trips-contact officers for details)
2. Submit to Publicity Director for publication
  - a. Emailing your flyer is not sufficient, not all members receive club information via email. Make sure you've completed the flyer in time to be included in at least one official newsletter (that reaches all members)
3. Go to club meetings
  - a. Take copies of flyers and blank Application and Agreement forms

- b. Talk about your trip to others – let them know you are excited about the event and that you want them to go along!
  4. Participate in other club activities
    - a. Talk to others at the activity about your trip

### **3. Realize**

1. Keep advertising
2. Take reservations
  - a. Keep list of participants (see below)
  - b. Take reservations on First-come-with-Money, First-served basis
  - c. Notify participants of their check receipt and status (ie. on the bus/airplane or on the waiting list) as quickly as possible. Notification that the trip participant does indeed have a seat on the trip is greatly appreciated. It can be as simple as emailing the notification.
3. Contact suppliers prior to event to confirm
  - d. Bus company
  - e. Lodging
  - f. Travel agent
4. For long trips, it is a good idea to make up “ID” cards for each skier with the trips leaders’ names and lodging, such that in the unlikely event that the skier is rendered unconscious, or worse, they may be identified
5. The Club normally has the following items for use on trips (contact an officer):
  - b. Leg bands
  - c. Sandwich baskets
  - d. Large cooler
  - e. Large water dispenser
  - f. Garbage bags
  - g. Paper towels/napkins
6. If leaving cars parked at the Glenn Research Center,
  - a. Prepare a list of participants and their car license numbers
  - b. Submit to guard at main gate the DAY OF the event
7. Prepare a list of emergency contact information for all trip participants
  - a. Include names and phone numbers
  - b. Keep a copy with you at all times during the event
  - c. Leave a copy with one of the officers not involved in the event-
    1. Club president
    2. Appropriate vice president
8. If a second pickup location has been designated:
  - a. Save seats for those persons
  - b. Identify and use a specific place for their belongings (e.g. separate compartment under the bus)
9. Make sure all participants have signed an Application and Agreement Form
10. Take cash for driver tip
11. Keep advertising
12. Arrive early for departure.
13. Check-in all participants.

14. Upon arrival at destination, check-in with the organization for tickets and local information (trail maps, etc.) Distribute tickets as soon as possible to all participants.
15. Have fun!
16. Before departing, check-off all participants before leaving.

#### **4. Finalize**

1. Submit Activity Closeout to Treasurer and Board
  - a. See example on next page
2. Write an activity report and submit to Publicity Director for newsletter
3. Record "lessons learned" and submit to board

**Participants**

	First	Last	Member	E. Side	NASA	Grd list	Citi-zen	App	Aggr.	Pmt	Bus	Lift	New Mem
1	Gene	Addy	Y		Y			Y	Y	\$ 27.00	1		
2	Phil	Armada+C1	N		Y	Y	Y	Y	Y	\$ 55.00	1	1	X
3	Bruce	Auer	Y		Y			Y	Y	\$ 47.00	1	1	
4	Charlotte	Buschur	N	Y				Y	Y	\$ 35.00	1		X
5	Barb	Cool	Y		Y	Y	Y	Y	Y	\$ 47.00	1	1	
6	Tim	Crewdson	N	Y				Y	Y	\$ 35.00	1		X
7	Mike	Duerk	Y		Y	Y	Y	Y	Y	\$ 47.00	1	1	
8	Janet	Dubas	Y		Y	Y	Y	Y	Y	\$ 94.00	1	1	
9	Matt	Dubas	Y		Y	Y	Y	Y	Y	^	1	1	
10	Colette	Gschwind	Y	Y				Y	Y	\$ 47.00	1	1	
11	Bernadette	Kan	Y		Y			Y	Y	\$ 47.00	1	1	
12	Kathy	Mason	N		Y	Y	Y	Y	Y	\$ 55.00	1	1	X
13	Sandy	Maurer	Y		Y	Y	Y		Y	\$ 47.00	1	1	
14	Kathleen	Moran	Y		Y	Y	Y	Y	Y	\$ 47.00	1		*
15	Brandon	Mullan	N		Y	Y	Y	Y	Y	\$ 55.00	1	1	X
16	Alex	Rosenberg	Y	Y				Y	Y	\$ 47.00	1	1	
17	Irina	Rosenberg	Y	Y				Y	Y	\$ 47.00	1	1	
18	Kirill	Rosenberg	Y	Y				Y	Y	\$ 47.00	1	1	
19	Cheri	Seiler	Y		Y			Y	Y	\$ 47.00	1	1	
20	Jim	Slifka	Y	Y				Y	Y	\$ 47.00	1	1	
21	Roger	Svehla	Y		Y	Y	Y	Y	Y	\$ 47.00	1	1	
22	Fred	Teren	Y	Y					Y	\$ 47.00	1	1	
23	Rosie	Wittrup	Y		Y	Y	Y	Y	Y	\$ 47.00	1	1	
24	Malcolm	Wood	Y		Y	Y	Y	Y	Y	\$ 47.00	1	1	
Totals										\$ 1,108.00	24	20	

cash  
cash

**Expenses**

Bus										\$ (745.00)
Lift Tickets										\$ (400.00)
Bus Driver Tip										\$ (50.00)
Postage for flyers										\$ (22.20)

**Misc**

K. Moran Lift Refund										\$ (20.00)
New Memberships (5 single)										\$ (40.00)

**Trip Net (loss)** \$ (169.20)

\* Last minute cancel  
Bus refreshment cost of \$37.82 covered by trip coordinator

## **Forms to Use**

The following forms should be used for your trip or activity.

1. Activity Budget Estimate
2. Cash Transaction Statement
3. Trip Application and Agreement
4. Minor Release Form
5. Medical Treatment Release Form
6. Activity Closeout Report

Although examples are included on the next few pages. You should download the latest versions of the forms from the Lewis Ski Club web site at <http://www.lewisskiclub.org/forms.htm>

**Activity Budget Estimate**

Activity: \_\_\_\_\_

Date(s): \_\_\_\_\_

Activity Coordinator: \_\_\_\_\_

Mail Stop: \_\_\_\_\_ Phone: W \_\_\_\_\_ H \_\_\_\_\_

*Estimated Number of Participants* \_\_\_\_\_

**COSTS :**

Description(bus, lift, refreshments, driver tip, etc.)	Cost/Person	Total Cost/Line Item
---	-------------	----------------------

_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

Total Cost Per Person: \_\_\_\_\_

Total Trip Cost \_\_\_\_\_

**Proposed Trip Price/Person** \_\_\_\_\_

**Cash Transaction Statement**

SAMPLE of the Cash Transaction Statement  
do not copy this form, use carbon forms available from treasurer

<b>CASH TRANSACTION STATEMENT</b>			
TODAY'S DATE _____	CHECK REQUEST _____		
NAME OF ACTIVITY _____	DEPOSIT _____		
DATE OF EVENT _____			
=====			
DEPOSITS: (LIST ALL FUNDS YOU ARE TURNING IN)			
DESCRIPTION	AMOUNT		
_____	_____		
_____	_____		
_____	_____		
_____	_____		
TOTAL DEPOSITS		_____	
=====			
DISBURSEMENTS: (LIST ALL ITEMS YOU NEED A CHECK FOR)			
PAY TO THE ORDER OF:	DESCRIPTION	AMOUNT	CHECK #
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
SIGNATURES:			
ACTIVITY LEADER _____		TREASURER _____	
WHITE – TREASURER		YELLOW – ACTIVITY LEADER	

**Trip Application and Agreement**

**Trip Application and Agreement**

The undersigned participant applies to participate in the Lewis Ski Club, Inc. trip described below, subject to the following terms and conditions:

- 1. DEPOSIT: Advance trip deposits must be paid and submitted with a signed Application and Agreement for a reservation to be made and held. Balance shall be due and payable in accordance with payment schedules established by Lewis Ski Club, Inc.
- 2. WITHDRAWAL & CHANGE: Lewis Ski Club, Inc. may withdraw any trip from its schedule at any time; may refuse to accept or retain any person as a participant at any time for any reason; and may change the itinerary at any time.
- 3. RESPONSIBILITY: Lewis Ski Club, Inc. is acting gratuitously for the applicant and shall not be responsible or liable for any loss of or damage to baggage, property, or for any loss, injury, death, accident, delay, inconvenience or any other loss occurring during or occasioned by the applicant's participation or lack of participation in any trip.
- 4. VALID IDENTIFICATION: For domestic trips, participants are responsible for having up to date and valid proof of identification. For trips out of the USA, participants are responsible for having up to date and valid passport, visas and proof of identification and citizenship.
- 5. MINORS: Any minor participant's Trip Application and Agreement must be co-signed by his/her parent or legal guardian. The minor must be accompanied on the trip by a parent or legal guardian or their designee who shall be wholly and fully responsible for said minor's conduct and well being.
- 6. PAYMENT: All payment checks shall be payable to "Lewis Ski Club, Inc."
- 7. CANCELLATION & REFUND: Cancellation by participant means and includes: failure to abide by the terms of this agreement; notice by participant of intent to cancel; participant's failure to make timely payments; participant's failure for any reason to meet departure or return of trip.

Trip: \_\_\_\_\_

Name: \_\_\_\_\_ Phone: (H) \_\_\_\_\_

Address: \_\_\_\_\_ (W) \_\_\_\_\_

E-Mail: \_\_\_\_\_

Person to contact in the event you need emergency care:

Name: \_\_\_\_\_ Phone: (H) \_\_\_\_\_ (W) \_\_\_\_\_

I have read and agree to all the terms of this Agreement, and waiver of liability, as of this date.

Signed in Agreement \_\_\_\_\_ Date \_\_\_\_\_

GIVE TO TRIP COORDINATOR

**Minor Release Form**

**MINOR RELEASE FORM**

I, \_\_\_\_\_, do hereby designate \_\_\_\_\_, who is a legal adult (18 years of age or older), to be the escort of and to supervise the conduct of \_\_\_\_\_, who is my legal dependent, during the Lewis Ski Club, Inc. activity on \_\_\_\_\_ (date) to \_\_\_\_\_ (location).

*I recognize that the activities of the **Lewis Ski Club, Inc.** may involve risk of personal injury and that the club and its officers and members are not responsible for the safety and well being of any member or guest while participating in a club activity.*

Signature: \_\_\_\_\_ (Parent or Guardian)

Date: \_\_\_\_\_

Emergency Telephone number: \_\_\_\_\_

I, \_\_\_\_\_, certify that I am a legal adult (18 years of age or older) and I hereby accept the responsibility of escorting and overseeing the conduct of \_\_\_\_\_ during the Lewis Ski Club, Inc. activity noted above.

*I recognize that the activities of the **Lewis Ski Club, Inc.** may involve risk of personal injury and that the club and its officers and members are not responsible for the safety and well being of any member or guest while participating in a club activity.*

Signature: \_\_\_\_\_ (Escort)

Date: \_\_\_\_\_

Emergency Telephone number: \_\_\_\_\_

One copy of this form is to be kept by the activity coordinator and one is to be kept by the escort.

Take this completed form along with you on the trip

**Medical Treatment Release Form**

**MEDICAL TREATMENT RELEASE FORM**

I, \_\_\_\_\_, give my permission for \_\_\_\_\_, my dependent, to participate in the Lewis Ski Club, Inc. activity on \_\_\_\_\_ (date) at \_\_\_\_\_ (location).

In case of an emergency, I may be reached at \_\_\_\_\_.

If efforts to reach me by phone are unsuccessful, I give my permission for \_\_\_\_\_, my dependent, to be transported to the nearest hospital for medical treatment.

Signature: \_\_\_\_\_ (parent or guardian)

Date: \_\_\_\_\_

Family Physician: \_\_\_\_\_

Telephone: \_\_\_\_\_

Known Allergies: \_\_\_\_\_

Other known medical ailments: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

One copy of this form is to be kept by the activity coordinator and one is to be kept by the escort.

**Take this completed form along with you on the trip.**

**Activity Closeout Report**

**ACTIVITY CLOSEOUT REPORT**

Activity: \_\_\_\_\_

Date(s): \_\_\_\_\_

Activity Coordinator: \_\_\_\_\_

Mail Stop: \_\_\_\_\_ Phone: W \_\_\_\_\_ H \_\_\_\_\_

**Section I:**

Total Number of Participants \_\_\_\_\_

**INCOME:**

<i>Item</i>	<i>Quantity</i>	<i>Price</i>	<i>Total</i>
(Bus Seats Filled, Lift tickets, Etc.)			
_____	_____	x _____ =	_____
_____	_____	x _____ =	_____
_____	_____	x _____ =	_____
_____	_____	x _____ =	_____
_____	_____	x _____ =	_____
<b>TOTAL INCOME:</b>			_____

**EXPENSES:**

All receipts from bus, hotel, purchases, etc. must be attached as verification of expenses.

<i>Description</i>	<i>Total</i>
_____	_____
_____	_____
_____	_____
_____	_____
<b>TOTAL EXPENSES:</b>	_____

**NET :** \_\_\_\_\_ (income - expenses)

## Club Policies

### 1. Pricing

1. Lewis Ski Club, Inc. is a nonprofit organization.

**Bylaw 5** of the club's **Constitution** states:

*Fees charged to activity participants may not be increased beyond the estimated per-person costs charged by purveyors of goods and services for an activity in order to reduce the fee charged to the Activity Coordinator for the activity.*

*Complimentary items offered to an Activity Coordinator by a purveyor of goods or services may be accepted, providing that this does not increase the cost of the activity to the participants, and the offer of the gratuity is the policy of the purveyor. The Activity Coordinator may make use of the gratuity as he/she sees fit. Trips may be offered to the officers or specific members of the club. It is the policy of the club to permit this person to accept the offer, or, if he/she is unable to accept, to select an appropriate alternate to represent the club.*

This means that:

- a. the Club's policy is to price activities so they run as near to break-even as is reasonably possible.
  - b. you cannot have your trip expenses paid by increasing the cost to the other participants in the activity.
  - c. you may, however, make use of gratuities offered to you as part of conducting an activity.
2. The Executive Board has established that the Activity Coordinator for a bus trip must be on the bus of that trip to act as a chaperone. Since their attendance is mandatory, the Ski Club will cover the cost of one seat per bus involved in the trip. The Activity Coordinator can designate a chaperone for each extra bus. The Activity Coordinator should simply deduct the cost of a bus seat from their personal trip payment, which is entered as a separate line item on the Activity Closeout.

### 2. Non-refundable deposits

1. Usually, deposits are required to secure reservations for an activity. Activity Coordinators can determine the amount of these deposits and deem them non-refundable if needed to ensure that they or the club will not be responsible for expenses over and above a reasonable amount.
2. Also each Activity Coordinator must publish a **refund policy** for their activity before collecting any money for the activity.
  - i. NOTE: Club policy is that bus fare is not refundable unless the trip is completely full and someone fills that seat.
3. A waiting list should always be kept for use in the event of a cancellation.

4. Trips lasting several days and involving air travel, overnight accommodations, etc. will usually require substantial deposits in order to hold reservations.
5. Activity Coordinators may not make financial commitments for the Club without the approval of the Executive Board and should not make commitments for themselves (See Section VII).

### **3. Advertising**

1. Be positive!
  - a. You are a representative of the Lewis Ski Club
  - b. You want people to want to go on your trip
2. Promote your trip
  - a. Contact people – don't wait for them to come to you
  - b. Advertise to everyone you talk to
3. Have an alternate contact
  - a. If you will be out of town or unable to answer calls regarding your trip
  - b. Consider having a co-trip leader who acts as your backup throughout the trip in the event you are unavailable or unable to go on the trip
3. All written material must be reviewed by the Publicity Director and the executive board
4. No smoking is permitted on the bus for bus trips -- State this in your flyer

### **4. Participation**

1. The Club's *Constitution, Article III, section 6*, states:

*All members in good standing with the Lewis Ski Club, Inc. will be eligible to attend all club activities as defined in Article VI. Participation in club trips will require club membership.*

1. Questions on a participant's membership status should be referred to the Membership Chairperson.
2. The membership list will be made available to all trip coordinators.
3. Notify participants of their check receipt and status (ie. on the bus or on the waiting list) as quickly as possible.

### **5. Signing contracts**

1. For the protection of the club and the individual officers or chairpersons, all contracts, leases, agreements, etc., should be in the club name only.
  - a. Sample clause: "This agreement for rental of banquet hall is between the ABC banquet hall and XYZ Ski Club, Inc."
2. If an officer/chairperson signs only his or her name, then he or she may be personally responsible for the contract.
3. When composing a contract, the mention of the club being incorporated should be stated both in the body of the contract and the signature.
4. When the officer/chairperson signs a contract in behalf of the club, sign for the club, not for self. ***Never sign only your name!***

Correct ways to sign: "XYZ Ski Club, Inc. by J. Doe, Trip Coordinator"  
"XYZ Ski Club, Inc. by J. Doe, President"

Incorrect ways to sign: "J. Doe, Pres. of XYZ Ski Club, Inc."  
"J. Doe, Pres."  
"John A. Doe"

5. Only sign contracts, leases, agreements, etc. with the knowledge and oversight of the appropriate Vice President and the President.
6. Send a copy of all signed contracts, leases, agreements, etc. to the appropriate Vice President.

## **6. Accounting**

1. All transactions associated with each activity will be processed through the Club's treasury.
2. The Activity Coordinator **must** use the carbon forms of the Cash Transaction Statement (sample in Appendix A2) for transactions and record keeping. All deposits and disbursements will be recorded using the Cash Transaction Statement form, which are obtainable from the Treasurer, President, or Vice Presidents.
3. Payment checks from participants are to be made out to "Lewis Ski Club, Inc." and deposited into the Club's treasury in a timely manner.
  - a. Exceptions are:
    - i. trips that have a high possibility of cancellation such as the weather dependant single day Nordic trips. These trips are less expensive and the treasury can carry the total cost momentarily. In the event of a trip cancellation, simply return the checks to the participants. If the trip goes, deposit all of the checks at once.
    - ii. 1-day ski trips – Coordinators should keep all checks until the trip happens. In the event of a trip cancellation, simply return the checks to the participants. If the trip goes, get all of the checks to the treasurer so that they can be deposited as soon as possible.
4. Disbursements for the costs of the activity should come from the Club treasury.
5. The Treasurer and the President are empowered to write checks against the Club Treasury. The Activity Coordinator may obtain funds for trip expenses by submitting the Cash Transaction Statement form to either officer.
6. After the completion of the activity, within **30 days** submit an Activity Closeout to the Treasurer. All transaction forms, receipts, sign-up lists, and other pertinent documentation for the activity should be included with the closeout report.
7. Send up to twelve of your best photos with captions of the trip to the Club's web curator and photo chair. (See names and email addresses on the

## 7. Refreshments

1. To refresh or not to refresh – that is your question!
2. The Activity Coordinator may decide what, if any, refreshments are to be included on the trip. Traditionally, one-day trips include pastries and juice on the bus ride to the ski area. You will also need paper napkins and garbage bags. Some of these supplies may be available in the Club storage room. Check with the President or a Vice President for access.
3. For longer trips that may include a meal on the bus, include an option for those who don't eat meat or have religious dietary restrictions.
4. Nonalcoholic beverages should be provided as an option for all.
5. The club does have a membership at Sam's Club which is for the use of the trip coordinators. Please see the President to obtain the club's card and be aware that payment must then be made via a club check.

## Advise

<i>Myth</i>	<i>Reality</i>
Build it and they will come.	People are slow to join in. There are many entertainment alternatives. You need to make a personal impression on them to go along.
Bus drivers always know the best route to destination.	Not always. Get route information ahead of time and <i>politely</i> go over it carefully with the driver.
Travel agents know about skiing and what skiers want.	No. Get references. Are they skiers themselves?
You can use a credit card to make a reservation.	No. Instant financial commitments are never necessary, no matter what the sales representative says. The club doesn't have a credit card for this reason. Don't use your own.
Participants will get on the bus at the right time.	No. Announce rendezvous times repeatedly and check to make sure everyone is on the bus.
Bus drivers always know where to pick up participants.	No. Demand that the bus company notify bus drivers of pickup location.