

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

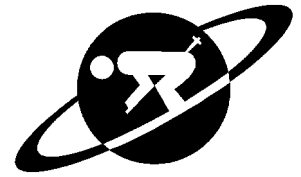


Table of Contents

Introduction

Steps for Running an Activity

- Organize
- Advertise
- Realize
- Finalize

Forms to Use

- Cost Estimate
- Cash Transaction Statement
- Application and Agreement
- Minor Release
- Medical Treatment Release
- Activity Closeout

Club Policies

- Pricing
- Non-refundable deposits
- Advertising
- Participation
- Signing contracts
- Accounting
- Refreshments

Advice

Introduction

Thank you for volunteering to be an Activity Coordinator (aka, Trip Leader) for the Lewis Ski Club! This guide describes official Lewis Ski Club Policies and refers to the Club's Constitution and Bylaws where appropriate for running Club sponsored trips and activities.

Steps for Running an Activity

I. Organize

1. Select place and date for the trip.
 - a. Contact ski resorts to determine if they are hosting conflicting events
 - b. Contact the executive board and appropriate V.P. to confirm.
2. Obtain costs of activity:
 - a. Transportation
 - i. Bus/airplane/train/carpool, as appropriate
 1. It is Club policy that Bus contracts for One Day Trips are negotiated as a group by the Alpine V.P. Be sure your proposed trip is included in the request for quotes to be issued by the Alpine V.P.
 2. It is Club policy that airfare is negotiated and purchased through the travel vendor contracted by the Trip Leader for the Club.
 3. It is the discretion of the Trip Leader to allow participants to deviate from the negotiated travel package for a given trip.
 - ii. Estimate all tips and gratuities, as appropriate
 1. Bus drivers (\$1-2/passenger)
 2. Porters/other service personnel
 - b. Lodging
 - i. based on occupancy, as appropriate
 - 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)
 - e. Miscellaneous
 - i. Postage
 - ii. Mementos
 - iii. Prizes
 - iv. Etc.
3. Prepare estimated budget
 - a. Calculate total cost
 - b. Calculate per person price

- i. for bus trips, pricing to a breakeven point of ~80% occupancy is suggested
- ii. For week long trips, obtaining quotes for 25 to 30 participants from vendors is suggested
- c. See example spreadsheet: tab -- Activity Budget Sheet

II. 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.
 1. Your contact info will be published in the newsletter and on the ski club's webpage. Please note that an email alias is available and suggested (e.g. holidayvalley-march2012@lewisskiclub.org). Also, a google voice phone number can also be used instead of your personal phone number if you prefer.
 - v. The Refund Policy must be stated
 1. See Club Policies, Section II
 - 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. Make sure you've completed the flyer in time to be included in at least one official newsletter (that reaches all members; i.e., email message is not enough!)
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

III. Realize

1. Keep advertising
2. Take reservations
 - a. Keep a list of participants (see spreadsheet, tab – Activity Participant List)
 - 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.
 - d. Keep the Trip Applications and Agreements forms for 1 year following the trip. After that time, please shred the documents.
3. Contact suppliers prior to event to confirm
 - a. Bus company
 - b. Lodging
 - c. Ski Resort
 - d. Travel agent
4. The Club normally has the following items for use on trip (contact an officer):
 - a. Leg bands
 - b. Large cooler
 - c. Large water dispenser
 - d. Garbage bags
 - e. Paper towels/napkins
5. 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
6. If a second pickup location has been designated:
 - a. Save seats for those persons (duct tape or velvet ropes)
 - b. Identify and use a specific place for their belongings (e.g. separate compartment under the bus)
 - c. And, CLEARLY communicate the location of the second pick-up point, especially if it is different than the club's "normal" pick-up location.
7. Make sure all participants have signed an Application and Agreement Form
8. Take cash with you for driver tip and misc. expenses
9. Keep advertising
10. Arrive early for departure.
11. Check-in all participants.
12. Upon arrival at destination, instruct participants where to wait to receive their lift tickets. Check-in with the organization for tickets and local information (trail maps, etc.) Distribute tickets as soon as possible to all participants.
13. Have fun!
14. Before departing, check-off all participants before leaving.

IV. Finalize

1. Submit Trip Closeout Report and copies of your receipts to your VP for concurrence and then to the Treasurer within 30 days.
 - a. See example spreadsheet, tab – Trip Closeout Report.
2. Write an activity report and submit to Publicity Director for publication in the next newsletter
3. Record "lessons learned" and submit to board

Paper Forms to Use

You may print and use these forms to prepare and run your trip, the forms mentioned above are included in an excel workbook.

- Activity Budget Estimate -- from spreadsheet!
- Cash Transaction Statement (must use carbon form – see Treasurer)
- Trip Application and Agreement – from website (sample below)
- Sample one day trip flyer (included)
- Minor Release and Medical Treatment Release – from website (sample below)
- Activity Closeout – from spreadsheet!



SAMPLE of the Cash Transaction Statement

do not copy this form, use carbon forms available from treasurer

CASH TRANSACTION STATEMENT

TODAY'S DATE _____ CHECK REQUEST _____

NAME OF ACTIVITY _____ DEPOSIT _____

DATE OF EVENT _____

=====

DEPOSITS: (LIST ALL FUNDS YOU ARE TURNING IN)

DESCRIPTION

AMOUNT

DESCRIPTION	AMOUNT
_____	_____
_____	_____
_____	_____
_____	_____

TOTAL DEPOSITS _____

=====

DISBURSEMENTS: (LIST ALL ITEMS YOU NEED A CHECK FOR)

PAY TO THE ORDER OF:

DESCRIPTION

AMOUNT

CHECK #

PAY TO THE ORDER OF:	DESCRIPTION	AMOUNT	CHECK #
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

SIGNATURES:

ACTIVITY LEADER _____

TREASURER _____

WHITE – TREASURER

YELLOW – ACTIVITY LEADER

Sample – get latest and greatest from website!

Lewis Ski Club
Trip Application and Agreement

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

- 1. DEPOSIT: The required initial deposit for this trip must be paid and submitted along with a signed Trip Application and Agreement. Balance shall be due and payable in accordance with payment schedules established by Lewis Ski Club.
2. WITHDRAWAL & CHANGE: Lewis Ski Club 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 is acting gratuitously for the applicant and shall not be responsible or liable for any loss of damage to baggage, property, or for any loss, injury, death, accident, delay, inconvenience or any other loss occurring during or occasioned by applicant's participation or lack of participation in any trip.
4. IDENTIFICATION: Each participant is responsible for having and taking with them a valid, current, government-issued, photo ID.
5. MINORS: Any minor's participant Trip Application and Agreement must be co-signed by his/her parent or legal guardian.
6. PAYMENT: All payment checks shall be payable to "Lewis Ski Club, Inc.".
7. CANCELLATION: If the participant cancels out of the trip, then the participant forfeits their rights to any and all payments made to Lewis Ski Club for this trip.
8. ELIGIBILITY: Lewis Ski Club membership is required to participate.
9. EXTRA FEES: Price does NOT include any additional fuel surcharges, baggage fees, or airport fees which may be imposed prior to the date of travel.



Trip Name: []
Applicant Name: []
Address: []
Phone: (H) [] (W) [] (Cell) []
Email Address: []

Required for Airline Ticketing: Date of Birth: (MM/DD/YYYY) []
Required for Bus Trips: Pickup Location [] West OR [] East
Lewis Ski Club Member? [] Yes [] No (If NO, Please Include Membership Application Form)
Optional Trip Insurance? [] Yes [] No (For Extended Trips. If YES, Information will be sent to you.)

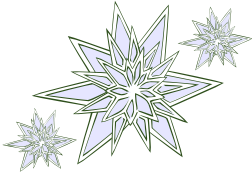
Trip Specific Info: []

Emergency Contact Information:
Name: []
Phone: (H) [] (Cell) []

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

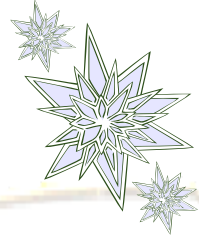
Signed in Agreement: _____ Date: _____
Signed in Agreement: _____ Date: _____
(Signature of parent or legal guardian if participant is under 18)

This is a sample flyer! Have fun creating your own!



Holiday Valley 3

Western NY. Resort
With the Lewis Ski Club

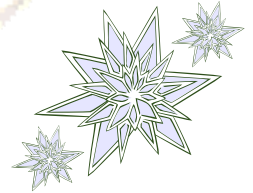


Friday, March 9, 2012

\$68 per person (Lift ticket and bus)*

Round-trip transportation from Cleveland to Holiday Valley included. We will also provide breakfast snacks on the bus.

Itinerary: 6:00AM Leave NASA DEB parking lot (North side of Brookpark Rd.)
6:30AM East Side Pickup - Home Depot parking lot on Wilson Mills Rd.,
Just WEST of 1-271. **DO NOT PARK IN DENNY'S**
10:00AM Arrive at Holiday Valley
4:45 PM Go into Ellicottville for dinner (on your own)
7:00 PM Bus leaves for Cleveland
10:00 PM East Side Drop-off
10:30 PM Bus Arrives at NASA



Group rental discounts available.

Please contact: **Trip1 Coordinator1** and/or **Trip2 Coordinator2**

Email: holidayvalley-mar2012@lewisskiclub.org

Make Checks payable to: **Lewis Ski Club, Inc.** and mail along with Trip Application form to:
Trip2 Coordinator2
1234 Southeast Northwest Road
Cleveland Heights, OH 44106

- *Must be a member of the NASA Lewis Ski Club - \$10 single/ \$15 family (separate check)
- ~ Reservations are 1st come, 1st served with payment in full.
- ~ No refunds made for your bus seat, unless your spot is filled.
- ~ Every skier must complete a **trip application** form
- ~ Please download forms from www.lewisskiclub.org
- ~ Minors (under 18) not accompanied by parent or legal guardian must have a Minor Release Form.

Revised May, 2012

NASA Ski Club Membership is OPEN to the whole community:
(You don't have to work at NASA to be a NASA Ski Club Member)

Lewis Ski Club 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, on the Lewis Ski Club activity on _____ (date)
to _____ (location).

I recognize that the activities of the Lewis Ski Club 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 of parent/guardian: _____

Date _____

Phone number where you may be reached: _____

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 activity noted above.

MEDICAL RELEASE

I, _____, give my dependent,
_____, permission to participate in the Lewis Ski Club activity of
_____ at _____ (location) on _____ (date).

In case of an emergency, I may be reached at [telephone number(s)]
_____.

If efforts to reach me by phone are unsuccessful, I give my permission for
_____ to go to the nearest hospital for medical treatment.

Signature of

Parent/guardian: _____

Date: _____

Family Physician: _____

Club Policies

I. 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 must show the cost of their seat as INCOME from the ski club (similar to that of a one-day trip raffle winner prize), which is entered as a separate line item on the Activity Closeout. Activity Coordinators should pay the full amount they owe for the trip up front. This makes for cleaner accounting and easier funds tracking for the Treasurer.

II. 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 the Club will not be responsible for expenses over and above a reasonable amount.
2. Each Activity Coordinator must publish a **refund policy on the trip flyer for their activity** before collecting any money for the activity.
 - i. Club policy is that trip applicants are responsible for non-recoverable costs due to cancellation

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.
 - i. Club policy is that deposits withheld due to cancellations are not included as part of the trip budget. As such, they are held in the Club treasury until a proposal for their utilization is made the Trip Coordinator, and approved by the Executive Board.
 - ii. Club policy is that any change (increase or decrease) in activity costs (transportation, lodging, lifts, etc.) greater than \$20 per person requires review and approval of a revised trip budget by the Executive Board.
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).

III. 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

IV. 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.

V. 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 Lewis 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: “Lewis Ski Club, Inc. by J. Doe, Trip Coordinator”
“Lewis 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 (Alpine, Nordic, or Activities).

VI. Accounting

1. All transactions associated with each activity will be processed through the Club’s treasury.
 - a. Bylaw 7 of the Club Constitution states:

7. ADVANCE OF FUNDS FROM THE TREASURY

The Treasurer will provide advances from the treasury to an Activity Coordinator only if there is an expectation of repayment to the treasury from funds collected from the participants of the activity. These advances are usually made for the transportation or lodging deposits, which are required before all fees are collected from the participants of the activity. A trip budget page (Appendix A, Activity Guide), showing the expected expenses and recommended price must be submitted to the Executive Board before an advance may be authorized. The Treasurer will provide advances from the treasury only if a cash transaction statement accompanies the request.

This means that when the proposed trip budget is approved by the Executive Board, a Trip Coordinator may receive advances from the Treasury up to the amounts specified for the individual elements of cost for the trip.

Advance payments for airfare, lodging, etc., are typically made according to a payment schedule specified by a contract executed with the vendor, if available. Trip Coordinators must make timely requests for advances from the Treasury to ensure payment is made according to the terms of the contract.

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 as soon as possible.

Revised May, 2012

- 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.
 - a. If an amount for misc. expenses is included in the approved trip budget (snacks, beverages, gift items, picture party, etc.) Club policy is that the Trip Coordinator may request and receive an advance of funds from the Club Treasury for the amount budgeted
 - b. Receipts for all expenses incurred by the trip must be retained and presented with the trip closeout report in order to receive reimbursement.
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 trip, 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 Webcurator. (See names and email addresses on the website.)

VII. 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.

Advice

<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 and the right place.	No. Announce rendezvous times and locations 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.