

**University of Wisconsin Oshkosh
Learning in Retirement Organization**

Tour Organizing Guidelines

Spring 2013

Introduction:

Organized tours are one of the most popular types of activities offered by the Learning in Retirement program at UW Oshkosh. LIR members on the Curriculum Committee plan tours to a variety of destinations; museums, wildlife sanctuaries, businesses, tourist attractions, and live stage performances of national traveling shows, theater or symphony performances in nearby cities.

This document is intended to be a guide to identify types of tours to present to the Curriculum Committee and strategies to run a successful tour. The LIR Curriculum Committee should review this document periodically.

Organizing Tours

1. Any LIR member can propose a potential tour. This idea should be shared with the Curriculum Committee. Once approved by the committee the individual can develop a general plan:
 - a. Potential date(s)
 - b. Primary destination
 - c. Secondary destinations (if any)
 - d. Meals
2. Contact each destination
 - a. Identify a contact person, a telephone number, an email address, and the street, city, state, and zip code. Clarify the destination is appropriate for coach tours.
 - b. Clarify restroom availability at the destination. If restrooms are limited look for an alternative stop prior to first destination. Depending on length of bus ride, a restroom stop should be planned and included in the itinerary.
 - c. Talk with contact(s) about drop off, pickup points, and bus parking. If destination is in a large city request information regarding route to site.

d. Discuss potential date(s).

- Define the activity available at the destination(s).
- For museums: Will docents be available? Discuss splitting into smaller groups. This is important due to hearing issues for some of the participants.
- Length of time for activities to set bus schedule.
- Cost of the activity:
 - 1) Admission fees or performance tickets: Inquire about group/senior citizen discounts that may apply.
 - 2) Is there complimentary admission for the bus driver and/or the tour organizer?
 - 3) The LIR office adds administration fees for each cost bearing activity.
- Some sites have a *suggested donation*. The tour organizer must determine how these admissions will be paid and ensure that they do get paid.
- If this is a new venue, this requires a **W9** form on file and an invoice so that a payment can be processed.
- If a second activity is included – follow the steps above.

e. Including a meal:

- Does the time length of the trip dictate time for meal?
- What type of meal; sit-down in a restaurant, catered meal, or bring-your-own lunch?
- If choosing a restaurant or catered meal, ask the contact person at the destination for suggestions. They may provide phone numbers and a contact name at the restaurant.
- Contact restaurant and find out the cost of the meal; explore the use of group/senior citizen or other discounts. Restaurants may have a recommended group menu. Is there a complimentary meal for the bus driver and/or the tour organizer?
 - 1) Participants enjoy at least two or three choices, beverage and small dessert.
 - 2) If alcohol is available at the site, tour coordinator needs to explain to both restaurant AND participants that they may purchase their own beverages from the bar.
- LIR is tax-exempt using the University of Wisconsin Oshkosh number. Once a menu and prices are determined, discuss the payment process. Is a deposit needed and by what date? When is

the final meal headcount needed (the most common due date is two weeks in advance)? Is the final payment due in advance or can it be made on the day of the tour?

- Work with LIR Office Assistant to be sure venue is aware of UW Oshkosh Accounting Office requirements; such as W9 form and invoice 10 business days prior to tour if wishing payment day of tour.
- Note: The LIR credit card cannot be used for meals. University policy dictates that all payments cannot be made without proper documentation.

Defining the particulars:

1. Using an online map program, plan the route of the tour. Most tour coordinators make a “dry run” of the expected activity. A drive through verifies the tour route, mileage and time of travel. This information should be shared with the bus driver on the day of the tour.
2. A timeline for the tour includes: pickup time, destination arrival time(s) and ending time at the end. Include all travel time and all stops. This information goes on the Tour Proposal Form.
3. Identifying locations/sites for potential restroom stops is helpful. Highway rest stops, restrooms in malls and facilities such as McDonalds and Culvers are appropriate choices. Remember that additional stops add to the cost of the bus.
4. The coordinator should know where the destination is located in the community. Share this information with the driver before the start of the tour. You may have to be the travel guide. There are several possibilities: 1) Some bus drivers are familiar with the destination; 2) other bus drivers have never made the trip before; 3) In some cases, bus drivers do not know their destination until you tell them. Most buses are now equipped with GPS systems that can aid the driver.
5. The coordinator can decide if the bus will have multiple pickup sites, such as Oshkosh and Appleton for a trip to Door County or Oshkosh and Fond du Lac for a trip to Madison or Milwaukee. (Note: these additional stops need

to be built into the time frame and cost structure because the bus will be on the road longer.)

6. When working through requirements of the tour, find out if there are any dress codes or similar requirements for participants. One example: sandals and open-toed shoes are not permitted at several industrial sites. Check on handicap accessibility such as elevators. Clarify if there will be excessive walking and standing.
7. Recruit a co-coordinator for the tour; educate this individual about the tour, or take them with you on your drive through. Co-coordinators play an important role during bus loading; being a 'sweeper' to be sure participants are keeping up during the tour and participant count on the bus before departure.
8. Using the attached planning sheet put together the sequence of destinations with contact information, entrance or ticket fees, mileage to each site, and if included information about meal(s) for the tour.
9. Confirm the date of the tour and complete the *Tour Proposal Form* either on line or hard copy and send to the chair of the Curriculum Committee and the LIR Office Assistant.
10. Work with the LIR Office Assistant to decide when the payment letters will go out. What will be the final payment date? Most tours require a minimum of 30 participants to justify renting a bus. Check on tour cancellation policies and refunds written in the LIR by-laws.
11. Assist the LIR Office Assistant to follow up on any forms; invoices, W9 forms, etc. that will be needed to process payment. These documents need to be into the university 10 business days prior to the tour in order to have checks cut in time.

Two days prior to the tour:

1. Reconfirm with each destination through a phone call or email to verify that the destination is ready for the tour group. (Note: The LIR Office Assistant will verify the bus arrangements.)
2. Contact the LIR Office Assistant and pick up (1) a roster of confirmed tour participants; (2) if needed, any checks for the program; (3) if needed, any tickets for the program; (4) if needed, food choice tickets; (5) envelope for bus driver tip.

The Day of the Tour

1. Arrive at the pickup site 20-30 minutes before boarding time. Be early! By arriving early you or the co-coordinator can check off the participants as they get on bus.
2. Introduce yourself to the driver.
 - Discuss route, stops, destinations and related trip information (i.e. if they will receive a complimentary tour or meal).
 - If available share a complete copy of the itinerary with contact names, phone numbers, etc. so that the bus driver is fully aware of the days' agenda
 - Exchange cell phone numbers with the driver – in case of an emergency.
3. Count heads or use the tour participant list to verify the passengers on the bus. If there are no-shows, do not wait an unreasonable amount of time before departing (5 minutes at most). If participants are delayed due to road conditions, i.e. accidents and still plan to attend be ready to call your first stop to inform them of a slight delay. Having cell phone contact numbers is critical here.
 - Once everyone is aboard, introduce the driver.
 - Sometimes they like to give a Safety briefing.

BE PREPARED FOR ANYTHING

1. At each stop, inform the participants when the bus will be re-boarding. For example, if you are at a rest stop, specify the number of minutes and the time that the bus will resume the journey. Or, at destination, where to meet the bus after the activity is over and expected departure time. Head count is important here.
2. When departing the bus, remind the passengers to take what they need before we see the bus again, or if they can leave items such as coats, etc. on the bus during a performance.
3. If you will be departing and re-boarding the bus several times on the tour, take turns exiting the bus by side of the bus, left side and right side.
4. On the last leg of the tour, pass around an envelope for tips for the bus driver.
5. At the end of the tour, thank the bus driver. Remind participants to check overhead bins and around their seats for any articles brought on the bus.
6. The envelope is presented to the driver after everyone has left the bus.
7. Head for home and enjoy the rest of the day, knowing you are leaving behind a job well done!
 - If there has been issues (i.e. leak on the bus roof, poor driver, poor food, etc.) write up a report to give to the LIR Office Assistant.

MULTI-DAY TOUR

Because of the different logistics, these need to be designed differently

1. Tour coordinator (and co-coordinator) should do a preliminary trip to see the site(s) are conducive to an overnight tour. Things to check for are: contacts at venues, housing and restaurant options, time and mileage and potential rest stops along the way.
2. Present idea for overnight tour to Curriculum Committee. If agreed to,

develop potential dates and itinerary of the activity with all contacts and information available. (Use planning sheet attached to develop itinerary)

3. Lamers Bus Company is under contact with the UW System to provide overnight bus tours.
 - Contact the tour planner at the Green Bay Office. Send itinerary including: all the contacts, addresses, entry fees, preferred housing and any menu's for meals to be arranged. Also, mileage for the whole trip should be available. Include LIR Office Assistant email contact info.
 - Once the contract is developed by Lamers tour planner, it should be sent to the LIR Office Assistant. The contact needs to be reviewed and authorized by the UW Oshkosh Administrative Services Office.
 - When signed contact is returned to LIR office the Office Assistant will need to order a check to cover the deposit that is sent to Lamar's with the signed contact.
 - Once approval has been received, the Tour Proposal Form should be completed and forwarded to the Chair of the Curriculum Committee and LIR Office Assistant. This information will be incorporated into the Course Offering Guide mailed to the LIR membership.
 - The tour dates may be publicized dates without specific costs because of possible price changes.
 - Letters of payment need to be mailed earlier for this type of overnight tour. LIR is providing enrollees and fall under Lamers rules.
 - This type of tour MUST have a minimum enrollment of 30 participants. Other guest participants may be invited to participate to ensure the tour will run.

TOUR PLANNING GUIDE SHEET

1. Selected tour destination(s) & Course title: _____

A. _____

Type of Activity _____

Cost per person _____

Deposit/Contract needed by _____

Tax Exempt info sent _____

Final Payment due _____

Request invoice to office by _____

Contact: _____

Phone # _____ Email: _____

Address: _____

City, WI & Zip _____

Distance from Penny's Parking Lot _____ to B site

B. _____

Type of Activity _____

Cost per person _____

Deposit/Contract needed by _____

Tax Exempt info sent _____

Final Payment due _____

Request invoice to office by _____

Contact: _____

Phone # _____ Email: _____

Address: _____

City, WI & Zip _____

Distance from B to C _____

C. _____

Type of Activity _____

Cost per person _____

Deposit/Contract needed by _____

Tax Exempt info sent _____

Final Payment due _____

Request invoice to office by _____

Contact: _____

Phone # _____ Email: _____

Address: _____

City, WI & Zip _____

Distance from C to D _____

D. _____

Type of Activity _____

Cost per person _____
Deposit/Contract needed by _____
Tax Exempt info sent _____
Final Payment due _____
Request invoice to office by _____

Contact: _____
Phone # _____ Email: _____
Address: _____
City, WI & Zip _____
Distance from D to E _____

Preferred date(s) of activity: _____

Size of Coach needed (36, 45, or 55) _____
Coach arrival time: _____
Coach departure time: _____
Coach return time: _____

Menu choices (if necessary)

Choice tickets prepared for restaurant and participants by LIR Office

Time table for activities:

_____ Leave Penney's Parking Lot
_____ Arrive at A
_____ Leave A
_____ Driving time between A & B
_____ Arrive at B
_____ Leave B
_____ Driving time between B & C
_____ Arrive at C
_____ Leave C
_____ Driving time to D
_____ Arrive at D
_____ Leave D
_____ Driving time to Penney's Parking Lot

This tour does _____ or does not _____ approve pick up or ticket pick up at other sites.
If yes, where will coach stop? _____
Time for pick up: _____