

CHECK LIST FOR TRIP ASSISTANT PROCEDURES I DID (TC= trip coordinator; TA= trip assistant)

- CREATE FLYER AND HALF SHEET FLYER & GET TC'S APPROVAL.
- BRING FLYERS TO BOARD MEETING WHEN TC ASKS FOR BOARD APPROVAL
- CALENDAR** WHEN TRIP WILL BE ANNOUNCED.
- PUT FLYER ON FACEBOOK AND GIVE TO LARRY SMITH AFTER TRIP IS ANNOUNCED
- CREATE TRIP SIGN-UP SHEETS.
- RESEARCH TRIP TRIVIA & GET TC'S APPROVAL
- BUY SNACKS & WATER (sign & give receipts to TC)
- DECIDE ON A GAME & BUY PRIZES IF NEEDED (sign & give receipts to TC)
- PUT SIGN-UP SHEET AND FLYER IN TRIP BINDER AT APPROPRIATE TIME. PUT THE HALF SHEET FLYERS IN OFFICE AND TAKE SOME TO MEETINGS. BRING TO THE MEETING THESE THINGS: A TRIP-LABELED ENVELOPE FOR THE CASH BOX, PAPER CLIPS (TO ATTACH RECEIPT TO CASH), RECEIPT BOOK, SEVERAL PENS FOR MEMBERS TO USE, CHECK ENDORSER.
- BEFORE THE FOLLOWING MEETING: PICK UP THE TRIP BINDER AND UPDATE THE SIGN-UP SHEETS (IF THEY WERE IN OFFICE GETTING MORE SIGN UPS) & TAKE TO MEETING.
- DURING OR AFTER EACH MEETING, TC AND TA WILL EACH TAKE A TRIP ENVELOPE OF MONEY AND MATCH THEM TO THE SIGN UPS BEFORE LEAVING ATOMIC BOWL.
- TC WILL TAKE CASH TO OFFICE AND TA WILL TAKE SIGN-UP SHEETS HOME TO UPDATE IT FOR THE OFFICE. TAKE TO OFFICE BEFORE THURSDAY AT NOON.
- START ADDING EMAILS TO THE SIGN-UP SHEET TO USE WHEN REMINDING TRAVELERS.
NOTE: CAN USE SAME EMAIL COLUMN FOR TO EMAIL THE TRIP REMINDER.
- 3 DAYS BEFORE THE TRIP: TA WILL EMAIL ALL TRIPPERS A REMINDER 3 DAYS BEFORE TRIP (CALENDAR THIS).
- MAKE SNACK BAGS (ONE FOR DRIVER).
- INSERT THE MASTER MEDICAL SPREADSHEET IN FOLDER TO TAKE.
- SORT THE SIGN UPS ACCORDING TO PICK UP CITY AND THEN ALPHABETICAL.
- PRINT THE ITINERARY TO INSERT IN THE SNACK BAGS.
- PRINT THE BUS MATES NAMES TO INSERT IN SNACK BAGS.
- IF THERE ARE GAMES, INSERT WHATEVER IS NEEDED IN SNACK BAGS. NONE FOR TC OR TA.
- WHOEVER (TC OR TAC) LIVES IN THE FIRST PICK-UP CITY WILL BRING THE STOOL, SNACKS WITH WATER INSIDE. THEY WILL CHECK OFF MEMBERS AS THEY GET ON THE BUS.
- WHENEVER TA GETS ON, THEY BRING BUS DRIVER SNACK BAG, 1 EXTRA SNACK BAG, TRASH CAN, AND ANY PRIZES PLUS 1 EXTRA PRIZE (IN CASE OF A TIE).

- WHOEVER GETS OFF LAST (TA OR TC) THEY SCAN THE SEATS AND FLOOR FOR TRASH. IF THE TRIP IS MORE THAN 1 DAY, TAKE EXTRA TRASH BAGS AND SNACK BAGS/WATER FOR EVERY DAY.

TRIP ASSISTANT PROCEDURES THAT I DID (some of which can be done by the Trip Coordinator if desired)

This person should be able to use Excel or some other spreadsheet program that allows sorting member sign-ups alphabetically and by city of bus pick up.

This person should have Word or some other word processor capable of designing full-page color flyers and a half-sheet black and white flyer to print out and hand out at meetings and the office. The color flyers distribution: 1- in acrylic stand up for Board meetings and General meetings; 1- covered in plastic for wall in office; 1 in trip binder; and 1 to our Treasurer. Half-sheet flyers printed and cut for as many as you think are necessary for a General meeting and initially at the office. The office volunteers will make more copies if they run out.

Making Trip Flyers

The TC decides on a trip and they give the following to the TA: event name and where it is, date(s), trip price, bus pick up times at both cities, if there are nonrefundable costs (and if so, what is deadline to sign up), when the trip should first be announced – at a meeting or in the newsletter, and how many travelers are maximum. The TC should also give the TA the bus quote page so the TA (or TC) can prepare a trip itinerary for insertion later in snack bags.

The TA will create a color flyer in Word using either an image the TC gave them or finding one of their own. They will also create a half sheet flyer (2 per page) suitable to be viewable in black and white.

Depending on when the TC wants to announce the trip, the TA will take 2 flyers to the office and put 1 in the acrylic stand up easel for the meeting; make copies of the half sheet for the office and for the meeting. If the TA is printing at their home, check with the treasurer to talk about printer ink reimbursement (I ask for it once a year) and they can pick up copy paper at the office. If they don't have a printer, they will have to save the flyers to a thumb drive and take to a place like Office Depot to have 4 colored copies printed and one copy of the black and white half sheet. Then the TA can print out the rest of the black and white half sheets on the Rover office copier and use their paper cutter.

Getting Trips Approved by the Board

Board meetings are from 1 to 2pm and always the Thursday before a General Meeting. (General Meetings are always on the third Wednesday of each month from 10am to 11am). TC's should attend Board meetings to get trips approved and answer Board questions. TA's are welcome to attend too. When the agenda gets to the TC, the colored trip flyer should be shown (I used to put it in an acrylic stand up easel and also passed around enough of the half sheets for everyone to see – "everyone" means all 7 Board members and what I call Board Adjacent members (the other TC/TA, Social Coordinator, Membership Specialist, Member Connection Coordinator, and any guest if known. The 7 members of the Board are the only ones to approve the trip and they may have questions so when the TC speaks, it should be a short in description, date and price and when they plan to announce it.

Advertising the Flyer

On the date of trip announcement, the TA will send a Word attachment via email of the colored flyer to Larry Smith at jojoandlarbear@yahoo.com and ask him to put it on the website calendar. The TA will send a colored copy of flyer to the Newsletter editor to put in the newsletter. Putting a color flyer on the Rover Facebook page: If the TA has a printer, they can lay the colored flyer on top of the screen and go to the printer's tool for scanning and save it as a jpg. They can then post a jpg flyer on the Rover Facebook page. If they are unable to do this, members of the Facebook page will have to wait until a meeting or until the newsletter comes out to see the trips because flyers have to be in jpg format. I understand you could download a supposedly free converter that converts Word documents to jpg which I've never done as I don't know which ones are scams. You could always just type the information on Facebook as a post in lieu of the flyer.

Creating a Spreadsheet for Sign Ups

There are templates you can use. The TA should put the TC's and the TA's names on the first two lines of the spreadsheet as they travel free. Have as many

numbered lines as your maximum going. Copy the category titles for the 2nd page and also above it on the 2nd page, type the name of the trip. This comes in very handy later. Take the sign-up sheets to the meeting (if it's announced there first) or put in the trip binder (if it's announced in a newsletter first). If it's announced first in a newsletter, the TA makes sure the flyers are in the trip book and on the office wall and half sheets are on the office desk on the first office open day after the newsletter comes out. See "General meeting" if it's announced in a newsletter for info on picking up the trip book before the meeting.

Office Volunteers Who Sign Up Members on Trips– It Takes a Village

There are around 16 volunteers who work in the Rover Office on Mondays and Thursdays from noon to 2pm. They appreciate TC's and TA's keeping them informed if anything unusual is required of them when signing up members for trips. Example: A Water2Wine cruise requires a meal option be written on the signup list; an overnight trip with hotel rooms requires members to have a roommate (if they don't have one it's up to the TC to advertise for one on Rover FB page or at a meeting; if the TC/TA decide the sign-ups are low and want to open it to guests of members, they should be sure to add a note to the trip flyer in the trip binder so office volunteers can have them fill out a guest form and waiver.

General Meeting

The TA helps take signups along with the TC. Make sure the members put the trip name in the memo line of their check. Also check for date and signature. Use the check endorsement stamp on each check and keep them in separate labeled envelopes per trip. During the meeting (i.e. during Vel's presentation) or after the meeting, compare the checks to the sign-ups to make sure they match. Make a checkmark on the spreadsheet as you do that check. Give the check envelopes to the TC who takes them to the office and puts them in the cash box. The TA brings the sign-up sheets home and adds the new travelers to the spreadsheet and puts them back in the trip binder and takes them to the office that same day or the next day (Thursday) before the office is open at noon. Keep doing this same thing as long as sign-ups continue to be taken at the meetings.

Before each General Meeting Thereafter

On a **Tuesday** (or after 2pm on Monday) before the General Meeting, pick up the trip book from the office and update the spreadsheet you have on your computer with the new sign-ups that occurred at the office. Don't take the whole binder to the **Wednesday**, General Meeting (just leave it at home), take just the spreadsheets. Update the spreadsheet as described in the previous section.

Trip Cancellations – See Operating Procedures 2.4.3

If they cancel **before** 3 days and there was no warning about nonrefundable expenses. The office volunteers shouldn't have to decipher the trip cancellation policy, therefore, if a member calls to cancel, the office staff will draw a line thru their name and write "cancelled" and the date they cancelled. They will tell the member that [insert TA's or TC's name] will call them about any refund due to them if there is one. Then the office person will call or email the TA or TC to get in touch with the traveler and tell them their refund will happen after the trip. The next time you pick up the spreadsheets at the office, cross that off on your sheet and in the next right column type "refund" (in Excel right click in line and choose Format Cells, Font, Strikethrough and change color to red. Our treasurer will send the cancelling traveler a refund check.

If they cancel when there IS a warning about nonrefundable expenses and it's after the date listed on the flyer. Again, the office will draw a line thru their name with the date and write "cancelled." They will call the TC or the TA and that person will need to contact the member to tell them there is no refund of nonrefundable expenses per Operating Procedure. But they may receive a refund for the meal and bus. You should do your thing explained above to red line them and write "no refund." Someone cancelling 3 or **fewer** days before a trip in that first category also gets "no refund" and date typed on your spreadsheet. There's no refund there either.

This is important, in both of these cases, make sure your typed sign-up sheet says "refund" or "cancelled" so the TC can make adjustments when she does the trip summary form and the member can get a refund.

To Shred or Not to Shred

The TC needs to check with the treasurer so see if there's ever a time the treasurer approves of offering to a traveler the option of shredding their check or returning it to them by mail. When an entire trip has been cancelled, the treasurer might approve that method.

Prep Time for the Trip

Buy snacks and water. Make sure you have enough lunch sacks. Get the itinerary from the coordinator and use that template to type the itinerary. Save it in your trip directory until shortly before the trip (sometimes the times get changed). Research some trip trivia to narrate on the bus. Keep in trip directory until you're getting ready for the trip.

The Last Check and Comparing of Money to Sign Ups

The TC has this responsibility to do this. If the trip is full, she can do this in the days leading up to the trip. When the double check is done and everything jives, she should text/email the Treasurer (Claudia) saying that she can deposit the money in the office whenever she likes.

Three Days Before the Trip

Pick up the sign-up sheets, update them and make sure there's an email for everyone. Send out an email reminder to all the trippers by sending it to yourself as recipient and bcc all of the travelers. Include a warning in your reminder that the time on the flyer for their bus stop is when the bus leaves and they should get there early and also to wear their badges or if inclement weather is in the forecast, to dress warmly. To send the email, just copy the column of email addresses on the sign-up spreadsheet and paste in bcc in your email.

Two Days Before the Trip

Sort by the city where the bus picks up. Put a blank line between the cities and then sort again to alphabetize each city separately. See the text box below for how to do this. Attach to a clipboard to take to the first bus stop.

In next 2 days, make the snack bags by putting water in first and other snacks next. Store them in separate boxes according to the pick-up city. Print out, cut and include itinerary in each bag. If you are playing a game that requires inserts or pencils, put them in. We have mechanical pencils which you will ask them to return after the game(s) when you pass around a container.

Games

Completely up to you. You can do Bingo. The usual is a prize for Bingo and a prize for Coverall Bingo. The Treasurer will reimburse you for about \$5 for each prize. One of our former TA's got prizes at The Dollar Store and large candy items at Costco. I ordered things from Amazon without asking for reimbursement which was just my personal preference because I spent more than the club would be comfortable with reimbursing.

Coordinate with the TC

Be sure you tell the TC the final trip count and better yet, send her a copy of the final sign-up sheet.

The Trip Day

Have your check off list on a clipboard. The RR stool should be kept by the TA. Whoever (TC or TA) is at the first bus stop, they should check off members boarding and when the bus gets to the other city, the other (TC or TA) does the check off for the other city. The stool should be with the person whose city is the first stop and you can pass it back and forth at the previous Board Meeting. That person will also be the last stop and once the bus is empty, that person should check seat areas for trash. If the TC gets off first, she will hand the driver tip to the TA to give to the driver at the end.

During the Trip

Ask the driver to put the stool in the hold area under the bus. The driver will take it out at each stop. Sometimes a driver will say they have a stool. It's not as sturdy as our stool which is vital to our member's health. We've had accidents without it. Since you will have several boxes of the snacks (for each city), you can also ask the

bus driver to put the second stop one under the bus until you get to that second pick up spot. Your prizes, your own snack bags, a snack bag for the driver should go on the bus.

Hand out snacks outside as members board or set the box down and have them help themselves. Check them off on your clipboard as they get on the bus. If you're missing someone at 5 minutes to the leave time, call them. Don't wait more than 5 minutes after the leave time for them or it throws off the entire itinerary. At the second city stop, the other person does the check off and the TA can set out that second box of snack bags.

The TA should see if the bus has a trash can around the same size as ours. Sometimes I've used ours if all they have is a kitchen trash bag hanging off their dashboard. Scooting a trash can down the bus aisle is easier for members to toss trash in and scoot it back. Just announce "Trash can coming down."

Read the trip trivia when it feels appropriate – same with games. Pass the trash can down the floor of the aisle a few minutes after a rest stop (they often buy goodies and want to get rid of the trash. Pass it again just before the first home stop on the way home. If you handed out pencils for a game, pass the bag they came in and ask them to send them back up.

After a Trip

If you purchased snacks/water/prizes and have the receipt, sign your name to it and give to the TC for the Trip Summary report.

MISC NOTES

Announcing times on the bus

- At each stop, tradition holds that one side or the other gets off first. Prior TC's have hung a stuffed toy above them up on the railing above the seats on the side that will exit next time. It does help remember each time but not necessary.

- The TC should announce the time to get back on bus before each stop. In our case, the TC and the TA have taken turns counting returning members after each stop.
- Nearing the first return bus stop, announce that you are passing the trash can down one last time. Scoot it down the aisle – Also announce something like “let’s hear a round of applause for ___ (driver’s name) for keeping us safe.” “Check your overhead bins for any of your belongings and have a safe trip home.”
- At the last return bus stop, TC or TA checks for trash on the floor and takes home the empty boxes, trash can if we used ours and the stool.
- During each stop, if the bus driver doesn’t stand next to the stool to help people who want an extra hand to get out, either the TA or the TC should do it. Just offer a hand – they may not need it but they may.
- The microphone is in an odd place when you get on and it’s hard to keep putting it back there when you need to use it off and on during the trip. As TA sitting behind the driver, and to avoid the mike cord going across the aisle, I put it on the indentation on my tray but I had to place something heavy in front of it (like my purse) or it would fall. It turns on in 2 places. Be sure to turn it off when you’re not actually announcing or others can hear your conversation.
- The conversation of who does what once on the trip between the TC and me was not pre-determined but she knew I would do games/prizes and trip trivia. She sometimes had some trivia of her own. We just talked about it either ahead of time or to each other from our seats.
- Regarding the water bottles I started buying from Amazon (paying for them myself because of the price). The name is **Waiakea Hawaiian Volcanic Water, Naturally Alkaline, 100% Oceanplast Recycled Bottle, 500ml - Pack of 24 for \$34.44**. Yes, more expensive than what you can get at a store. But I have had more compliments from lots travelers on the size (smaller), strength (doesn’t dent in) and the cap that an elderly person can actually open as it’s thicker in width. For 42 on the bus, that’s \$1.64 per person. The cheap ones at stores have broken on the bus

several times. If you like that idea, run it by the Board about getting reimbursed.

- When, due to low sign-ups, you've opened up the trip to the guests of members, be sure to tell the office, announce it on Rover Facebook and at a meeting and mark their names on your sign-up list who are members to you can welcome them during your first microphone announcement on the bus.
- GAMES: Some of the games I've done are Bingo, Coverall Bingo, put a # on snack bags and just draw a # for a prize, Mad Lib.
- Besides the trip trivia you research, there's a book I'm passing on with 60's, 70's and 80's trivia. That's fun to read a question and have them shout out the answers. At the Elk Feeding trip, I filled a large plastic jar with various animals including deer (couldn't find elk) and had them write down their name and their guess how many deer were in the jar on a piece of paper included in the snack pack. We have 40 mechanical pencils for each of the two TA's so I put those in the snack bags when something needs to be written by them for a game. I like making the prizes similar to the trip but it's not necessary. A previous TC bought large candy or cookie containers at Costco. On the Lion King trip, I put animal crackers in the snack bags and bought animal type prizes – one was a leopard scarf for a woman. I always had a prize in the waiting that was less feminine prize in case a man won. On this trip, it was a key chain with a lion on it and some candy. I also always took one extra snack bag and one extra prize on all trips.
- Additional things I took in a bag on a trip: paper towels (someone invariably spills something) and a small 1st aid kit.

In Excel, to keep Column A (numbers of members going) from sorting when you alphabetize or sorting by bus pick up cities, do the following:

Hide the title names below line 1. Highlight from the 3rd name down to the end but do not highlight column A. The reason you start at the 3rd name down is you want to keep the coordinator and assistant at the top.

Then go to the Data tab and Sort. Choose what you're sorting by the last name of the first person or sometimes the choice is Column C.

If you sorting by city, use same method but choose the 1st city name.