TRIP LEADER TRAINING/ORIENTATION

This is intended as a guide for running a Sailing Club trip. It cannot cover every contingency or difficulty. The Trip and Assistant Trip Leaders' experiences must also be used. For this reason, the club requires that one of the two leaders is a club-qualified skipper, and one of the two must have previously been a Trip Leader or Assistant Trip Leader.

Thank you for agreeing to serve as a Trip or Assistant Trip Leader. This work is very important to the club and we appreciate you willingness to take on this assignment.

Your goal is to design, advertise and run a safe, enjoyable trip for our members. The Club has been encouraging people to become cruising sailors for over twenty-five years. Over those years, the Club has developed procedures to help you stay organized as you move through the process. By now you have planned your trip and have submitted your draft write-up for the Membership Package provided at the Annual Meeting, and on our website.

Marketing the trip is important as well. One or both of the Trip Leaders will be expected to arrange a display table at the Annual Meeting and to make a presentation about the trip during the meeting. This is a good time to talk up the trip and to get early signups. Broadcast emails are also a useful tool. Procedures for this will be provided later.

Remember, this is supposed to be fun for you, too!

Trip operations can be viewed as having four main phases. These are:

I) Preliminary II) Enrollment III) Performance IV) Close-out.

These are not necessarily sequential. There will be some overlap.

I) Preliminary

This starts in the pre-season and includes specific location selection, establishing basic itinerary, slip and mooring arrangements, restaurant arrangements, etc. Most of this has been started by this time in order to have trip write-ups for the Membership Package. Also during this phase, presentations for the Annual Meeting & Dinner are prepared and delivered. A key person in your planning is the Charter Liaison. All dealings with the charter firm are done through the C.L. In addition, if you need to pay for reservation deposits for moorings, restaurants, etc., contact the Treasurer.

If these were not included in the trip fee, arrangements need to be made to collect money from the participants.

A NOTE REGARDING TRIP PRICING: The prices that have been established are based on many factors, not just the direct costs for your trip. What is important to remember is that unless a specific item was budgeted for (e.g. slip fees), the club cannot provide reimbursement, except under special circumstances, as approved by the Commodore and the Treasurer. The measure of a successfully executed trip is the happiness of the participants due to your thorough planning.

II) Enrollment

Here begins the arduous task of getting people to actually go on your trip, and has three components.

A) Sign-up

The Lottery: All applications received by the designated date are to be drawn in a random order, regardless of possible status as skipper, first mate or crew. Make a list, putting the Trip Leader, Assistant Trip Leader and companions, if any, at the top. This drawing is to be done regardless of the number of signups received to that date, as it establishes priorities for determining skippers, first mates and potential waitlists. From this list determine how many participants can be safely confirmed. For each boatful of names, there must be one skipper and one first mate (who could be another skipper). If it is necessary, skipper or first mate names from further down the list will have to be elevated, bumping the rest of the list down one or more positions. In addition, it is advisable to confirm one or two more skippers than boats confirmed, as skippers can potentially drop out as well as anyone. There is also a Club procedure for using a Provisional First Mate. Contact the Training Coordinator for more details.

Lastly, there may be one or more candidates for skipper or first mate desiring a check-ride. It is the candidate's responsibility to notify the Training Coordinator, who will then contact you. However, the candidate may also contact you. While no candidate is guaranteed a check ride on a specific trip, you will need to coordinate the effort with the Training Coordinator.

Action	***Direction***	***Comments***
Reservation forms and check	In to you	Keep a log of sign-ups, order received, amount received etc.
Confirmation/Status Notice	Out	Verify membership, send *membership application* if needed
Reminder Of Balance Due	Out	Send 75-90 days before trip date. Write your date here: / /
Final Balance Received	In	This is due 45 days before trip. Update the log sheet.
Final Confirmation Notice	Out	Late fees may apply if final payment is within 30 days of trip.
Late Fee Received	In	
Confirmation of Late Fee Rec'd	Out	Update the log sheet.

Checks from confirmed participants *only* are forwarded to the Treasurer for deposit. This should be done as often as you feel comfortable with. When submitting funds for deposit, the following is required: Make ***two*** sets of photocopies of all checks for deposit. Keep one for yourself and submit the other with the checks. This helps verify that nothing fell out of the envelope en route. Submit using the Accounting and Reconciliation Form, and indicate the dollar amount being sent. If you are mailing checks, notify the Treasurer by email, attaching this form.

You must coordinate new member sign-ups with the Membership Secretary, and verify membership of ALL other participants. Send membership forms to the Secretary, checks to the Treasurer.

B) Cancellations

If a confirmed participant notifies you of a need to cancel, that person may be entitled to some refund. For most trips, full refunds will be given for cancellations made 30 days or more before the trip departure date. If the cancellation occurs less than 30 days before the trip, it *may* be subject to a $25.00 cancellation penalty. Refunds may be paid at any time mutually agreed upon by the trip leader and Treasurer, as is the assessment of a penalty. Any unrecoverable costs not included in the trip price are generally not refunded.

Replacing someone who cancels is done from the wait-list, if any. If the cancellation was a skipper or first mate, the next skipper/first mate on the list is elevated to confirmed status; otherwise the next name on the list is then confirmed on the trip. If a skipper cancels, and no more skippers are signed up, then some confirmed participants need to be notified immediately of the possibility of their being dropped from the trip, and why. The names lowest on the confirmed list, which represent a number equal to the crew of the smallest boat, are selected. Further, broadcast messages should be sent to ALL skippers seeking their participation.

In the event anyone cancels less than 30 days before the trip departure date and no replacement is available, he or she will also be required to pay any additional fees and charges that cannot be canceled prior to the trip in addition to forfeiting all trip fees paid to date. For trips that require a more stable crew list, stricter refund policies may be implemented. Trip participants are always advised to read all trip documentation carefully. Individuals will not be permitted to select their own replacement unless the wait-list is empty.

BOAT CANCELLATIONS: In general, the Charter Liaison needs to be notified at least 45 days before the trip date if any reserved boats are to be cancelled without penalty. As this coincides with the due date for final payments from the participants, you should have a reasonably good idea of your flotilla needs.

C) Wait-list

This is used to fill cancellations, or to add additional boats to the trip. Use your judgment here. There are almost always some cancellations, so it's wise to not let the wait-list drop below about 6 people (if it's even that big to begin with) when filling additional boats, until you get closer to the trip date. Adding boats is not automatic - it is based on boat availability, logistics of where you are going, and what you want to do. If you are interested in adding additional boats, contact the Charter Liaison, who will work with you to find additional boats of appropriate size, if available.

III) Performance Phase

A) Skippers Meeting - Coordinate with the skippers on your trip to meet three weeks prior to your trip. Ask them to bring a copy of their résumé (if you do not already have a copy). The following items should be distributed to each skipper, prior to, or at the meeting,:

- Crew selection worksheet, showing first mates, preferences, etc.
- Information packet containing the following minimum set of documents:

❑ Contract	❑ Contract policy for skippers	❑ Charter Check-in/out form
❑ Crew Information Sheet	❑ Injury report	

- Include a copy of any other relevant information you may have, such as

❑ Tide tables, way points	❑ Waterway guide info	❑ Boat layouts	❑ Chart info
❑ Shore plan info (i.e. restaurant menus, museum literature, etc)			❑ Other

B) After the Skippers Meeting

- Prepare final crew list. Please use template provided.
- Confirm pre-trip meeting date with meeting location.
- E-Mail the following to all participants [including skippers]:

❑ Crew list	❑ Pre-trip meeting info/float plan to participants. Please use templates provided
❑ Risk Advisory	❑ Release/Zero Tolerance Form
❑ Crew Briefing Checklist	❑ Release/Zero Tolerance Form for Minors ❑ [if needed]. A minor is anyone under 18.
❑ Packing List	❑ Skipper/Crew Responsibilities
❑ Menu Planner	❑ Medical Emergency Information Form

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- Finalize trip logistics (reservations, docking, etc)
- Prepare meeting presentation.
- Coordinate getting checks for any planned expenses from the Treasurer.

C) Pre-trip Meeting

- Begin collecting Release/Zero Tolerance form. It is strongly suggested that you only accept *entire* boat's forms, not individually, or partial boat's. Remind the skippers that ***they*** are responsible for getting their boat's forms to you and that they must be filled out completely. *These are legal forms and will be retained by the Club for many years.*
- Distribute updated crew lists. Cancellations occurring after the skipper's meeting should be discussed with the skipper of the affected boat.
- Bring extra copies of pre-trip packages and distribute to any attendees who didn't get one.
- Introduction of participants, especially for new members.
- Review trip itinerary
- Facilitate individual crew meetings where Skipper and First Mate are absent
- Review marina location and support car pool efforts
- Conduct question and answer period

D) At The Boats

Prior to Departure on First Morning of Trip:

- Conduct skipper's meeting on the first morning.
- Ensure that skippers document any existing damage on check-in form. Have Charter company representative initial the Club's check-in form, and take photos. Collect remaining Release/Zero Tolerance Forms.
- Conduct any last minute business with charter firm if needed (as directed by C. L.)
- Help out with any boat/crew problems

During the Trip

- Conduct skipper's meetings regularly (i.e. at least each morning)
- Help out with any boat/crew issues

After Returning the Boats:

- Before leaving the marina, check in with as many skippers as possible to see if there were any new problems with boats and or crew. Also . . .
  - Collect any injury reports.
  - Collect check-in forms if possible. If any damage occurred, it should be documented on the form, and photos taken.

IT IS THE TRIP LEADER'S RESPONSIBILITY TO SEE THAT *ALL* FORMS ARE RETURNED TO THE CHARTER LIAISON, WHETHER MAILED DIRECTLY BY SKIPPERS OR NOT.

IV) Close-out

The first part of this phase involves sending out a request to all participants requesting that they complete an on-line trip evaluation. Sample language is included in the library of files provided you. The link to the survey will be provided to you at the end of your trip. In addition, the trip leadership team is expected to compose a 'trip story' for publication in the newsletter and on the website. Pictures would make for a better article.

The second part of this phase is one of the most important administrative phases as some of the documents involved either can protect the club or provide support for claims the club may have. Documentation goes to four individuals, the Commodore, the Treasurer, Charter Liaison and the Membership Secretary, as follows:

Commodore:

- ❑ Injury reports, if any.
- ❑ Final Crew List

Charter Liaison:

- ❑ Check-in/out forms (those not mailed directly by skippers)
- ❑ Damage reports, if any. *These should be discussed* ***immediately*** *after the trip with the C.L.*

Treasurer:

- ❑ Remaining checks for deposit
- ❑ Expense Reimbursement/Refund request
- ❑ Final Crew List *and* Release Forms, sorted by boat, Skipper's form on top.
- ❑ Financial Reconciliation verifying trip receipts and expenses.

Membership Secretary

- ❑ Final Crew List and remaining membership forms.

Contact Information for 2011 Sailing Season:

Commodore	Treasurer	Charter Liaison	Membership Secretary
Mary Ann Gordon	Bruce Gollob	Jim Hills	Clara Matejka
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