

Osher Lifelong Learning Institute
Procedures for Event Planners
Day Trips
September 2004

Planning a Trip

1. Picking a Date

Before you pick the date for a trip, check with the OLLI office (Susan or Kali), with the Co-Chairs of Events (currently Joanne Baribeau and David Murray) to make sure that there is not something else happening that day.

Start planning and making arrangements at least two, preferably three, months before the date of the proposed trip so that there is adequate time to publicize and register the participants.

1. Destination, Destination, Destination

The most important factor in the success of a day trip is picking a good destination.

Things to think about:

- A. OLLI is first and foremost an educational organization. Every trip should have an educational outcome. While a place like Foxwoods might be construed as “educational” in some regard, that is not its primary business.
- A. How many people can the destination accommodate? Taking a busload of 44 people to a museum that can only handle 20 is a bad idea.
- B. What kinds of value-added activities can the destination provide? Guided tours, expert lectures, behind-the-scenes tours, on-site lunch, other interesting sites nearby, etc.
- C. Are there adequate bathroom facilities, shade in the summer, warmth in the winter, places to sit when tired?
- D. Does this destination involve strenuous walking, lots of stairs, or lots of sitting down time? What will the experience be like physically? Any of the above is o.k. as long as the participants know ahead of time and can gauge whether this is appropriate for them
- C. Is travel to and from the destination a comfortable day’s journey, including adequate viewing time?

2. Transportation

How will the group get to the destination?

Will they drive themselves? (usually only if the goal is in Portland or environs)

Will they drive to a central meeting point and board a van or bus?

Will they drive to a central meeting point and walk together?

Will they take the Downeaster?

Etc.

If they will board a bus, go to **#3. Chartering a Bus**

3. **Chartering a Bus** -- Complete a **Transportation Request Form** and give it to Susan Morrow in the OLLI Office. Susan will get quotes from the bus companies and will book the bus.
4. **Venue Tickets** – If tickets are required for the destination venue (theatre, museum, etc.), research the price with any senior or group discounts that apply, find out about cancellation policies, times of shows, etc. Then give Susan the information for ordering, including the name of the person you talked with at the venue. She will do the actual ordering with a University Purchase Order or Purchasing Card.
5. **Budget**
Once you know the prices of the bus, tickets, etc. work with Susan to complete a budget and set the price per person for the trip
6. **Publicity**
OLLI trips are advertised in various ways: the newsletter, word-of-mouth, announcements at lunch during the semester, postcards to the membership (this costs money), the website, and notices sent on email to OLLI members online. Becky Quinlan and Susan Morrow can help you choose the modes of publicity.

Remember that the newsletter deadline is the 15th of the month prior, e.g., anything for the January newsletter has to be submitted by December 15.

It is good to announce a trip in two consecutive newsletters if possible.

7. **Template for Flyer**

Date, times, destination and activities, price, how to register, cancellation/refund policy, transportation, special clothing or personal items, expenses (like meals) not built into price, and OLLI members only.

No surprises.

7. **Registration**

Registration for trips is done by the OLLI office volunteers. Be sure that the office has all of the details about the trip.