

## **WESTWINDS GUIDELINES FOR ORGANIZING GROUP TRAVEL**

- Purpose

From time to time Members of the Westwinds Music Society may wish to organize travel that furthers the goals of the society, which are to provide adults with opportunities to learn and perform music led by professional music educators.

- Principles

- The participating Members organize each trip well in advance.
- Each trip is self-sufficient financially and not financed by regular program income.
- Each trip must be cash flow positive with excess in funds refunded afterward.
- Each participant is fully informed about all costs including fees and per-diems.

- Governance

- An Ad-Hoc committee of Members will be formed and held responsible.
- If the Ad-Hoc committee is ineffective or fails in purpose, the Executive's only duty is to cancel the trip and return any funds in excess of costs to date.
- All such trips must be operated and financed separately from the regular Westwinds program but not independent of Westwinds Music Society.
- The Executive must endorse all travel opportunities in advance. Approval process is as follows:
  - Preliminary proposal made to executive for endorsement in principle. This proposal must include where the trip will take place; why this is a good destination; whether the trip would include concert band, jazz band and/or choir groups; and names of individuals committed to working on the planning and organization of said trip. Note that while the proposal may recommend name of Director(s) and trip manager, the Executive must approve/assign these roles.
  - If the Executive endorses the preliminary proposal in principle, the presenter(s) will be expected to develop it in more detail: purpose, plan, organization structure, contacts at destination, musical component, tentative itinerary and budget (WW budget template must be used).
  - Executive approves detailed plan and budget.
- The participating Members will provide governance for all trips, including planning, organization and budget plus ongoing monitoring of plans and budget.
- A Director and trip manager as approved/assigned by the Executive must be in charge.
- All contracts to be reviewed by a 3rd party who is not participating in the trip. Only the President and Treasurer can sign contracts for Westwinds.
- The Executive must endorse in advance all travel information communicated to the general Membership.
- Regular (monthly) status reports must be made at executive meetings.
- All monies to be handled by office
  - Deposits, etc.
- Any adjustments to approved budget must be made by the Executive (if at the planning stage) or the participants (if after deposits have been paid)
- A final accounting of all money received and paid must be provided to all participants and the Executive, and excess funds returned to participants.

- Organization & Planning

- The trip should appeal to as many Members as possible to encourage participation. Travel by non-members is welcome.

- Start planning early, a well-organized trip takes a year or more to organize properly. (See attached timeline, page 3)
- Ensure equitable and reasonable distribution of responsibilities.
  - Recommendations:
    - small committee structure with specific names of willing individuals.
    - more than one Director if more than one performance group
    - enlist volunteers as much as possible for specific assigned tasks
- A pre-trip is highly recommended for new adventures.
- Limit use of flight exceptions.
  - All flights booked through office except individual exceptions, which are the responsibility of the individual.
  - Develop policy re: use of travel agencies vs. individual bookings. Fewer individual arrangements is better. Recommend that extended travel happen only at the end of the organized trip
- Balance between group/individual activities.
- Balance use of hotel/home stay.
  - Not all members willing to home stay.
- Rehearsal arrangements/schedules
- Provide pre-trip performances/get-togethers.
- Provide optional activities.
- The following should be available:
  - Cell-phone for emergencies
  - Emergency contact list
  - Travel booklet
  - Bus Moms/Dads
  - Pre-assigned buses
  - Possibility of one accompanying vehicle
- Provide information on:
  - Local customs
  - Instrument packing
  - Local weather
  - Luggage & packing
- Financial
  - Comprehensive budget
    - Fees for rehearsals & directors
    - Discounted passage & per diem
    - Administration fee
    - Uniform
    - Meals
    - Extra activities
    - Other
    - Contingency
  - Budget and plan must reflect a positive cash flow at all times
    - Borrowing from WW general fund is not permitted.
    - Separate bank account is used for all trip receipts and expenditures
  - Monthly member payments
  - Prepayment by participants is a necessity
- Communication
  - Regular meetings/correspondence with participants
    - Budget – details re: fixed and variable costs
    - Expectations

- Input
    - Status
  - Set participant expectations
    - On a bus for two weeks
    - Member etiquette
    - Individual practice & commitment
    - Life happens
- Music
  - Music does not need to cater to lowest common denominator.
    - Not all participants need to perform all pieces
  - Schedule appropriate number of rehearsals.
  - Provide pre-trip performance opportunities.
  - Provide equal and appropriate performance opportunities for all groups.
  - Provide the appropriate number of performance opportunities.

## **TIMELINE FOR TRIP PLANNING (FOR JULY/AUGUST TRIP)**

FEBRUARY 1<sup>ST</sup> OF PREVIOUS YEAR:

Preliminary proposal presented to executive and approved in principle.  
Director and trip manager assigned by executive.

APRIL 1<sup>ST</sup> OF PREVIOUS YEAR:

Detailed proposal presented to executive and approved.

MAY OF PREVIOUS YEAR:

Initial information meeting for WW membership to assess potential interest.

SEPTEMBER OF PREVIOUS YEAR:

Meeting to present plans, budget and collect deposits and post-dated cheques.

REGULAR UPDATES/MEETINGS FOLLOW: regarding rehearsals, trip preparation etc.

### **FOR CURRENT YEAR (Summer 2008):**

**Preliminary Proposal due March 3<sup>rd</sup>**

**Detailed Proposal due May 5<sup>th</sup>**

**Information meeting early June**

**Deposit meeting September 2007**