

Tour Organizer Guidelines
Learning in Retirement at UW Oshkosh
May 26, 2004



University of Wisconsin Oshkosh Learning in Retirement Program

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Organized tours are one of the most popular types of courses offered by the Learning in Retirement program at UW Oshkosh. LIR members on the Curriculum Committee organize tours to destinations such as businesses, tourist attractions, and live stage performances.

This tour organizer document is not intended to be a step-by-step manual but rather a guide to identify areas of concern as well as typical strategies to minimize potential problems.

Circumstances change over time, especially with bus transportation. The LIR Curriculum Committee should review this document periodically to ensure that it is kept current.

First Steps For the Tour Organization Process

1. Identify the reason for the tour and develop a general plan, to include the primary destination, secondary destinations if any, and meals.
2. Contact each destination and identify a contact person, a telephone number, and the street, city, state, and zip code. Verify that the destination is set up to accept bus tours. Discuss bus routes, drop off and pickup points, and bus parking. Ask about rest room availability at the destination. Some destinations cannot accommodate a large group, but will offer suggestions for a stop along the way. If a rest room stop is needed, the coordinator needs to include this in the itinerary.
3. Pick a target date and begin the process of defining the activity(ies) at the destination. This should include use of docents, length of time for activities, need to split into groups, and similar items. Determine the cost of the activity (admission); group/senior citizen or other discounts may apply and should be explored. Is there free admission for the bus driver and/or the tour organizer?

Some sites depend upon and recommend a suggested donation. If so, the tour organizer must determine how these admissions will be paid and ensure that they do get paid.

4. Determine the meal situation. Does the time length of the trip dictate allowing time for meals? Do you want sit-down meals in a restaurant, catered meals, and bring-your-own lunches? If restaurant or catered meals, determine the cost of the meal; explore the use of group/senior citizen or other discounts. The destination contact person can be a resource for suggestions. They may help you with phone numbers and may have contacts at restaurants. With restaurants, is there a group menu? For group sales, LIR groups are tax-exempt. Is there a free meal for the bus driver and/or the tour organizer?

After the meal issue is determined, work out the payment process. Is a deposit needed and, if so, by when? 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? The LIR office assistant **MUST HAVE** an invoice two weeks prior to the due date of the payment in order to have a check ready. The LIR credit card cannot be used for meals (side note, it cannot be used for hotel accommodations either). University policy dictates that all payments cannot be made without proper documentation.

5. Put together the sequence of destinations and meals for the tour. Set the date of the tour.

After the Tour has been Defined

1. After the tour has been defined, map out the route of the tour. Successful tour organizers recommend making a “dry run”, a drive following the tour route to determine distances and time of travel. If you do so, log this information for sharing with the bus driver on the day of the tour.
2. Develop a timeline for the tour, beginning with the pickup time and ending with the drop off time at the end. Include all travel time and all stops.
3. Identify locations/sites for potential restroom stops. Facilities such as McDonalds and Culvers are excellent choices.
4. Know where the destination is located in the community. Some bus drivers are familiar with the destination; others bus drivers have never made the trip before. In some cases, bus drivers do not know their destination until you tell them. You may have to be the travel guide.
5. Determine if you want to or would be willing to have multiple pickup sites, such as Oshkosh and Appleton for a trip to Door County.
6. Determine if there are any dress codes or similar requirements for the tour. One example: sandals and open-toed shoes were not permitted at several industrial sites.

7. Recruit an alternative organizer for the tour; educate your alternate about the tour.
8. Determine if a preview course is appropriate for the tour; if so, complete the *LIR Course Form* for the course.
9. Complete the *LIR Tour Course Form* and deliver it to the LIR Office Assistant, along with the *LIR Course Form*, if appropriate.

Two Days Before the Tour Date

1. Reconfirm each destination with a phone call 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 get (1) a list of confirmed tour participants; (2) if needed, any checks for the program; and, (3) if needed, any tickets for the program.

The Day of the Tour

1. Get to the pickup site 20-30 minutes before boarding time.

BE PREPARED FOR ANYTHING

2. When the bus arrives, discuss the route, stops, destinations, and related trip information with the bus driver.
3. Count heads or use the tour participant list or use some other method to verify the passengers on the bus. If you have no-shows, do not wait an unreasonable amount of time before departing.
4. When departing the bus, tell the passengers 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.

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When departing the bus, remind the passengers to take what they need before we see the bus again.

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.

5. On the last leg of the tour, pass around an envelope for tips for the bus driver.
6. At the end of the tour, thank the bus driver and give him the tips.
7. Head for home and enjoy the rest of the day, knowing you are leaving behind a job well done!