

# ORINDA HIKING CLUB

## GUIDE TO PLANNING AND LEADING AN OVERNIGHT TRIP

September 16, 2009

Thank you for volunteering to lead a trip for the Orinda Hiking Club (OHC). Through the hard work of trip leaders like you, the Club is able to offer interesting hiking trips to its members. You may choose to organize and lead the trip and hikes yourself. If you do not want to personally plan the trip logistics and hikes, you may hire a company which specializes in hiking trips and act as the trip coordinator.

Here are some **step-by-step, sequential guidelines** which will help you organize and lead your trip. Since the guidelines are written for all types of trips, each step may not apply to your specific trip. The attached contact list provides email addresses and phone numbers for all contacts denoted with an asterisk (\*).

### 1. DEVELOP A TRIP PLAN

You probably have a general sense of the location, length and type of trip you want to share with OHC members. Once you determine the dates and location of your proposed trip, you should:

- **Check the OHC trip schedule** in the last newsletter to confirm your trip will not conflict with scheduled or proposed trip dates or locations.
- **Contact the Domestic or International Trips Committee Chair\*** as soon as possible to discuss your proposal.
- Request assistance from the committee chair if you would like help completing any of the following steps. The chair will ask an experienced committee member to work with you and answer your questions.

Identify the **local area and trip information** you will need:

- **Research** the general area, potential hikes, transportation to/from base location and to/from trailheads, accommodations, restaurants, and local guides (if applicable).
- **Review the trip flyer template** (attached) for the information you will need to present to the committee and to the members.

- **Recruit a trip co-leader** who can assist you and is able to lead the trip if you cannot lead due to health or personal reasons.
- The **duration** of the trip is generally based on the distance from the Bay Area and the available hiking trails in the area. The Club tries to schedule a combination of regional short trips (2-4 days) and longer domestic or international trips (one-two weeks). It is acceptable to lead a long trip with one week of hiking since many members combine personal travel plans with the Club's trip.

Plan your **hikes**:

- Plan **one or more hikes per day**. If the trip is at least one week in length, you may want to plan a free day with optional activities in the middle of the trip.
- Determine the **distance and elevation gain** of each hike. You may want to add additional information such as the time required for the hike if distance and elevation do not adequately describe the hike.
- The Club strives to provide a variety of hiking trips. The leader may plan more or less difficult hikes as long as they are clearly disclosed in the trip flyer. If possible, provide an alternate hike if the main hike is strenuous.
- If the trip is near the Bay Area, you may want to plan an optional short hike on the first or last day.

Determine the **accommodations**:

- Identify the **type and cost** of accommodations and decide **whether lodging is included** in the trip price.
- You may choose motel/hotel type rooms or shared cabins/condos/group lodging.
- If you plan to stay in a motel, you may make a group booking and include it in the trip price or reserve a block of rooms and let participants pay for their own rooms.
- Accommodations at moderate prices are preferable.
- Pay particular attention to the number and type of beds per room since there will be either two singles or one couple per room.

### Plan for **meals**:

- Determine what **meal options** are available for breakfast, lunch and dinner.
- Decide **which meals are included in the trip price**.
- You may choose to plan one or more group dinners at a special location or for a welcome or farewell dinner.
- For the other meals, you should provide a **list of nearby restaurants** for breakfast and dinner which includes the type of food served and a general price range.
- Participants typically prepare their own lunches. If possible, it is nice to have in-room refrigerators for breakfast and lunch food.

### Identify what **transportation** is required for your trip:

- Determine **which transportation costs are included** in the trip price and what transportation is paid for by participants.
- If the trip destination requires air travel, participants typically make their own arrangements. It is helpful to provide the name of the nearest airport and identify available ground transportation to the group's lodging.
- Plan **local transportation** at the site, including transportation to the trailheads.
- For shorter regional trips, participants typically drive to the destination and can use their vehicles to carpool to the trailheads.

### Determine the **number of participants**:

- A long trip typically includes twelve to sixteen participants, including the leader and co-leader.
- You may want to include more participants on shorter regional trips.
- You have the discretion to modify the number of participants depending on your preferences or any space restrictions specific to your trip.

### Determine how you will **manage the trip**:

- You have the option of hiring a trip organizer or a local hiking guide.

- If you do not hire local guides, you and your co-leader should visit the site before publication of your trip flyer in order to inspect the lodging, try some restaurants and pre-hike your selected hikes. If you do not plan to pre-hike all your hikes, you should disclose this information in your flyer.
- The expenses of a site visit are not reimbursable.
- OHC does not reimburse leaders for expenses until the treasurer has received the deposit checks for the trip. This is a very important consideration when planning the publication date of the trip flyer, especially if you have to advance your personal funds to guarantee reservations.

Determine the estimated **cost of the trip**:

- Determine the estimated cost of your OHC trip.
- Slightly overestimate the cost of the trip to avoid trying to collect additional costs after the trip. It is much easier to remit small refunds.
- Determine a rough estimate of any significant additional costs, such as lodging, which are not included in the trip price.

## **2. PRESENT YOUR TRIP PLAN TO THE APPROPRIATE OHC TRIPS COMMITTEE**

Now that you have developed the theme and details of your trip, you need to get ready to present your plan to the appropriate trips committee. Before presenting your plan to the full committee, you should:

- **Notify the appropriate chair of the Domestic or International Trips Committee\*** of your desire to present your trip plan and flyer at the next committee meeting. Determine the date, time and location of the meeting.
- **Review flyers for other trips** published in previous newsletters and the attached template. They will help you prepare your flyer. All trip flyers are restricted to one page in the newsletter.
- **Prepare a draft trip flyer** for the newsletter using the attached template and guidelines. You enter a general description and date of your trip, the nature of hikes, leaders' names and contact information, details about lodging and meals, and the number of participants. Contact the committee chair if you would like assistance with the flyer.

- The trip flyer includes **additional information** about the cancellation policy, rules for priority selection of participants, and priority response date. Cancellation and priority determinations are governed by OHC policies.
- You **determine a deposit amount** which covers your initial expenditures plus any additional expense which would be incurred if a trip participant withdraws from the trip and is not replaced. Per OHC policy, the trip deposit should be at least 25% of the total trip cost. You also determine when the balance of the trip cost is due.
- All deposit and subsequent **checks are made payable to “Orinda Hiking Club”** and mailed to the leader’s address.
- If you have additional information which does not fit in the newsletter flyer, **prepare a more detailed description** for presentation to the committee and to potential participants who have questions about the trip. Such information typically includes details of the hikes, such as mileage and elevation gain.

**Attend the committee meeting and present your proposed trip:**

- **Bring copies of your draft flyer, draft additional information sheet and any questions** you may have about OHC trips in general or your proposed trip.
- After the committee’s approval, **your trip will be placed on the Club’s calendar** of scheduled trips by the committee chair.
- You and the committee **determine when your trip flyer should be published** in the quarterly newsletter. Please allow at least three months’ notice for regional trips and nine to twelve months’ notice for longer trips. Members who use airline frequent flyer miles appreciate twelve months’ lead time for international trips.

**3. ANNOUNCE YOUR TRIP TO THE OHC MEMBERSHIP**

Until the flyer is published, your trip will be listed as “proposed” in the newsletter calendar with the location, date and leaders’ contact information.

**Contact the Newsletter Editor\* for the due date of your flyer.**

- The **due date** is usually the fifteenth of the month before publication. The quarterly newsletter is published on the first day of January, April, July and October.

- You may **email your flyer and a photo of the destination** to the Newsletter Editor any time prior to the due date.

#### 4. SELECTION OF TRIP PARTICIPANTS

After the trip flyer is published in the newsletter, potential participants will mail deposit checks to you. You should:

- Keep a **record of the date each check is received**.
- The **priority selection period usually ends on the tenth day of the month of publication of the newsletter** but may be modified to conform to the actual distribution date.
- After the end of the priority period, **email the names** of everyone who sent you deposit checks within the priority period **to the OHC Statistician\* to determine membership status and OHC priority selection** based on hiking leadership and participation.

Trip participation is **restricted to OHC members** and is **subject to the Club's priority selection process**. After the Statistician informs you of the potential participants' membership and priority status, the trip **leader and co-leader select trip participants** according to OHC rules:

- **First**, confirm applicants are **current OHC members**.
- **Second**, select **members with priority status** as participants.
- **Third**, fill the trip with **members without priority status**.
- **Fourth**, establish a **waiting list** if there are more applicants than available spaces.
- A leader is not required to include anyone on the trip that the leader is uncomfortable with.
- The leader and co-leader **conduct a lottery if there are more applicants than available spaces**. This may occur when selecting trip participants or determining the order of the waiting list.
- Checks received after the priority period are processed on a first come, first served basis.

If the trip is not full:

- You may send an announcement of the opening(s) to the OHC membership via GoogleGroups. Ask the GoogleGroups Coordinator\* to help you if you are not familiar with GoogleGroups.
- You might also ask the trip participants to help fill the trip by contacting members who might be interested.
- If the trip is still not full, you determine whether you still want to lead the trip. If you do not want to do so, notify the committee chair of your decision and return all deposit checks to members.

## 5. COMMUNICATION WITH TRIP PARTICIPANTS

If the trip is a go:

- **Send a group email by the end of the month of publication of the newsletter to all applicants who sent deposit checks.**
- Tell them **who is on the trip and who is on the waiting list**. The waiting list should be arranged in order of lottery selection.
- **Email your detailed trip description to all participants** so they can be sure this trip suits them. This email should include all important information which does not fit on the trip flyer, especially the proposed length and difficulty of the hikes.
- **Inform all participants they are confirmed for the trip unless they withdraw by written communication to the trip leader within thirty days of the email announcing their selection.**
- For longer trips, **arrange a meeting of all trip participants**. Send a group email and offer several potential meeting dates to maximize the chances of universal attendance. Generally, the meeting is held at the leader's home but can be anywhere that is convenient for all. Hold the meeting shortly after the confirmation of the participants. For shorter trips, a meeting may not be necessary if email communication suffices.
- **Distribute all trip information** including directions to the destination, the meeting date, time and location, leaders' cell phone numbers, recommended clothing and equipment, hotel names and contact information, hike specifics, maps, public transportation options from airports, and regional points of interest.

- Remind participants of the **due date of the final check** and what reservations they need to make for themselves.
- **Request participants' arrival information. Also request emergency contact and medical insurance information.** Recommend evacuation, repatriation and/or trip insurance for international trips. Remind the group that Medicare does not provide international coverage.
- Prior to the trip, **solicit a volunteer to write the newsletter article** after completion of the trip. Although this may seem premature, it is easier to write the article if the author makes notes and takes photos along the way.

## 6. TRIP CANCELLATIONS AND RETURN OF DEPOSITS

Per OHC policy:

- Selected **participants are confirmed for the trip unless they withdraw by written communication to the trip leader within thirty days of the date of the email announcing selection.** The deposit check is fully refundable under these circumstances.
- **After thirty days, the deposit is not refundable until after the trip has concluded unless the trip vacancy is filled by a suitable replacement.** If a suitable replacement is found, the treasurer will refund the original participant's payment after the replacement check is received.
- **If the participant is not replaced, the trip payment(s) will be used to compensate other trip participants for additional costs they incur solely due to the withdrawal of the participant** after the initial thirty day withdrawal period. Such additional expenses include, but are not limited to, additional room costs, increased shared transportation costs and loss of the original discount or other charges imposed by the trip outfitter. After the trip has concluded, the leader calculates such additional expenses and the treasurer remits a check for the remainder of the payment(s) to the participant who withdrew. If there are multiple withdrawals, additional expenses will be divided equally regardless of order of withdrawal.

## 7. FINANCES

All income and expenses are handled by the Club's treasurer:

- **Mail the deposit checks of all confirmed participants to the OHC Treasurer.\***

- **Return or ask permission to destroy all other deposit checks.**
- After the Treasurer has received funds for the trip, she reimburses you for incurred expenses. **Send documentation of each expense** to her and she will promptly issue a reimbursement check.
- Mail checks for the balance of trip to the Treasurer.

## 8. ON-SITE RESPONSIBILITIES OF LEADERS

The OHC Statistician mails a **sign up sheet** for the trip. Make sure all participants sign the sheet before the first hike.

On a daily basis, you will:

- **Answer any questions** and address problems that arise.
- **Arrange the time and location of the evening social hour** to which participants bring their beverages of choice and appetizers. This is a good time to announce time, location and directions to the next morning's hike.
- **Maintain the daily hike schedule** which lists all participants and mileage hiked.

At the end of the trip, remember to:

- **Remind the author of the newsletter article** to confirm the due date with the newsletter editor. Request that photos for the article be emailed to the article author for coordination with the text.
- Ask for a **volunteer to host the reunion party.**

## 9. AFTER THE TRIP

**Mail the sign up sheet and the total mileage hiked** by each participant to the OHC Statistician.

**Send all remaining expense documentation to the Treasurer.** Provide accounting of any additional expenses incurred due to the withdrawal of an original participant who was not replaced. **The Treasurer will reconcile the participants' payments and the actual expenses of the trip.** If applicable, **the Treasurer will mail a pro-rated refund check** to each participant.

Congratulations, you are done! **Have fun at the reunion party.**