



LearningQUEST Trip Policy

General Policies:

1. Trips are open to LearningQUEST members only.
2. All trips should be totally self-funded by the participants.
3. A Trip Coordinator will be designated for every trip. This person is responsible for planning, coordinating and conducting the trip.
4. Trip Coordinator should not incur any personal or financial liability.
5. PDC must approve all trips. Further, PDC must obtain Board approval for the trip if advance deposits or contracts are required for the trip.
6. Requirements for trip liability waivers to be in accordance with the PDC Trip Waiver policy found in the PDC Policy document.

Trip Proposals:

1. The Trip Coordinator will plan all aspects of the trip and complete the LearningQUEST Trip proposal form and submit to PDC for approval. [Develop contingency plans for potential issues such as bad weather.]
2. The Trip Proposal is found at lquest.org under Forms-Proposals-Trip Proposal and Guidelines.
3. The Trip Reservation and Release of Liability Agreement is found at lquest.org under Forms – Event Liability Waiver Form.

Financial Responsibilities

Trips that do not require any money to be paid by participants.

1. Use normal registration process that is used for other “No Fee” classes.

Trips that have a fee but do NOT require advanced deposits or commitments

1. Examples are trips to the Art Museum, Botanical Garden, etc. where typically the registrant provides his own transportation.
2. In these cases, the Trip Coordinator sets requirements for payment and collects fees and pays expenses.
3. After the trip, the Trip Coordinator must provide a report to the Treasurer showing all fees and expenses



Charter Trips

1. A charter trip is one sponsored by another organization. (For example, Road Scholar)
2. The Charter trip vendor's financial, deposit and cancellation policies will be used. Per vendor request, the coordinator may collect all payments and forward to the vendor. All payments will be made to the vendor, NOT to LearningQUEST.
3. The Trip Coordinator will be the LearningQUEST representative and communicate with the participants as needed. This could vary depending on the Vendor's policies.

Trips that require advanced commitments.

1. Examples are when a bus must be scheduled or advance deposits are required.
2. Trips should be designed to "breakeven" so that the reservation fees cover all costs associated with the trip.
3. Registrant's checks must be made to "LearningQUEST Inc."
4. To estimate the cost for the trip, set a minimum number of participants, and determine fixed costs such as bus expense.
 - a. Divide the total Fixed Cost by the established minimum number of participants to determine the portion of fixed cost per person. Example: Bus Cost = \$200, minimum attendance = 20, Fixed Cost would be \$10 per person.
 - b. Add the estimated variable cost such as meals, entry fees, lodging, tips. Assume Variable Cost per person to be Meal = \$10, and Entry fee = \$5.
 - c. Total cost per person = \$25 [Fixed cost \$10 + variable \$15]
5. If any advance deposits are required, the Trip Coordinator can 1) request a check from the Treasurer for the deposits or 2) request a refund if he or she uses their own money for the payment of expenses.
6. Receiving participant's money:
 - a. Following Rally Day, the Registrar will provide the Trip Coordinator a list of people that have signed up for the trip.
 - b. The Trip Coordinator will then contact people on the list (up to the maximum number allowed on the trip) and request payment and completion of the Release of Liability Agreement. The Trip Coordinator will receive the checks and cash and provide them to the Treasurer for deposit. The Trip Coordinator will also provide a record of all income and expenses for the trip.



- c. Checks must be made out to LearningQUEST, Inc.
 - d. Checks for trips must be separate from checks paid for dues and/or term fees
 - e. If members drop out when money is requested, the Trip Coordinator will contact the next member on the list.
 - f. The catalog, brochures or placards that advertise the trip must have the following statement: **“Do not send payment for the trip until requested by the Trip Coordinator.”**
7. Paying expenses for trip:
 - a. The Trip Coordinator can either use their own money to pay expenses and later request a reimbursement from the Treasurer, or
 - b. Alternatively, the Trip Coordinator can total the anticipated costs and request an advance check from the Treasurer.
 8. When the trip is completed, the Trip Coordinator must provide an accounting of all money received and spent. Provide this to the Treasurer and to the PDC committee chair.
 9. Any excess money that is left after all expenses have been paid will be returned to the Treasurer.
 10. If there is a deficit at the end, the Trip Coordinator will request a refund from the Treasurer when the final accounting is submitted.
 11. Trips may be canceled if fewer than the minimum number of paid reservations has been received by the due date specified on the trip proposal.
 12. If a trip is canceled by LearningQUEST, then a full refund will be provided to all participants who have paid.
 13. If LearningQUEST handles the money and a participant cancels the trip for any reason, there will not be a refund from LearningQUEST. However, the canceling participant’s cost may be reimbursed by the next person on the waitlist. The canceling participant will contact the Trip Coordinator who will arrange for a substitute from the waitlist. The waitlisted person will make reimbursement directly to the cancelling person. The cancelling participant must not of their own initiative invite another person to take the place which would thereby deprive the person next on the wait list of the opportunity for the trip. The Trip Coordinator should verify that the reimbursement had been completed and add the replacement person to the trip list.
 14. This cancellation policy must be clearly stated and attached to the trip proposal and should include potential issues, such as weather, which may require cancellation of the trip.



Administrative Fees

1. The Trip Coordinator may add amounts to the fee for extras such as a pre-trip party or souvenirs, printing, or additional paperwork/administrative processes.
2. Include these costs in the trip proposal.