



**This is intended as a guide for running a Club trip. It cannot cover every contingency or difficulty. The Trip and Assistant Trip Leaders' experiences must also be used. For this reason, the Club requires that one of the two leaders is a club-qualified skipper, and one must have previously been a Trip/Assistant Trip Leader.**

Thank you for agreeing to serve as a Trip or Assistant Trip Leader. This work is very important to the club and we appreciate your willingness to take on this assignment.

Your goal is to design, advertise and run a safe, enjoyable trip for our members. The Club has been encouraging people to become cruising sailors for over thirty years. Over those years, the Club has developed procedures to help you stay organized as you move through the process. By now you have planned your trip and have submitted your draft write-up for the Membership Package provided at the Annual Meeting and on our website.

Marketing the trip is important as well. The trip leadership team will be expected to arrange a display table and make a presentation about the trip at the Annual Meeting. This is a good time to talk up the trip and to get early signups. *Broadcast emails are also a useful tool. Procedures for this will be provided later, but this starts after the Annual Meeting.*

Remember, this is supposed to be fun for you, too!

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Trip operations can be viewed as having four main phases. These are:

- I) Preliminary                  II) Enrollment                  III) Performance                  IV) Close-out.

These are not necessarily sequential. There will be some overlap.

## I) Preliminary

This starts in the pre-season and includes specific location selection, establishing basic itinerary, slip and mooring reservations, restaurant plans, etc. Most of this should have been started by this time in order to have trip write-ups for the Membership Package. Also during this phase, presentations for the Annual Meeting are prepared and delivered. A key person in your planning is the Charter Liaison. All dealings with the charter firm are done through the C.L. Further, if you need to pay deposits for moorings, restaurants, etc., contact the Treasurer.

***If these were not included in the trip fee, arrangements need to be made to collect money from the participants. These extra expenses should be clearly mentioned in the trip write-up, and participants notified of their obligation no later than the pre-trip meeting, and you need to have a plan for how you will collect these additional monies.***

**A NOTE REGARDING TRIP PRICING:** The established trip prices are based on many factors, not just the direct costs for your trip. It is important to remember that unless a specific item was budgeted for (e.g. slip fees), the club cannot provide reimbursement, except in special circumstances, as approved by the Commodore and the Treasurer. The measure of a successfully executed trip is the happiness of the participants due to your thorough planning.

## II) Enrollment

Here begins the arduous task of getting people to actually go on your trip, and has three components.

### A) Sign-up

**The Lottery:** All applications received by the designated date are to be drawn in a random order, regardless of possible status as skipper, first mate or crew. Qualified skippers who want to reserve an entire boat must first contact the Trip Leader to confirm boat availability. A Reservation/Release Form and a check covering all spaces desired on the boat must be sent to the Trip Leader.

**Make a list**, putting the Trip Leader, Assistant Trip Leader and companions, if any, at the top. This drawing is to be done regardless of the number of signups received to that date, as it establishes priorities for determining skippers, first mates and potential waitlists.

**Determine how many participants** on the list can be safely confirmed. For each boatful of names, there must be one skipper and one first mate (who could be another skipper). If necessary, skippers or first mates from further down the list are elevated, bumping the rest of the list down. It is advisable to confirm one or two more skippers than boats confirmed, depending on fleet size, as skippers can drop out as well as anyone. There is also a procedure for using a Provisional First Mate. Contact the Training Coordinator for more details.

**All confirmed participants must be members for the current season.** Verify this with the Membership Secretary. Any membership forms received with a trip reservation form should be forwarded to the Membership Secretary with a copy of the check, but submit the check to the treasurer with the other trip receipts [see below for how that is done].

**Candidates for skipper or first mate may be requesting a check-ride.** It is the candidate's responsibility to notify the Training Coordinator, who will then contact you. However, the candidate may also contact you. While no candidate is guaranteed a check ride on a specific trip, you will need to coordinate the effort with the Training Coordinator, as well as what skippers may be able to do it.

<i>Action</i>	<i>Direction</i>	<i>Comments</i>
Reservation & Release forms & check	In to you	Keep a log of sign-ups, order received, amount received etc.
Confirmation/Status Notice	Out	Verify membership, send <i>membership application</i> if needed
Reminder Of Balance Due	Out	Send 75-90 days before trip date. Write your date here: / /
Final Balance Received	In	This is due 45 days before trip, or as stated in the write-up. Update the log sheet.
Final Confirmation Notice	Out	Late fees may apply if final payment is within 30 days of trip.
Late Fee Received	In	Update the log sheet.
Confirmation of Late Fee Rec'd	Out	Update the log sheet.

**Submitting funds for deposit.** Checks from *confirmed participants only* are forwarded to the Treasurer for deposit. This should be done as often as you feel comfortable with. The following are ***required***:

- Complete, and verify, the Accounting and Reconciliation (A & R) Form.
- Make *two* sets of photocopies of all checks for deposit. Keep one for yourself and submit the other with the checks. This helps verify that nothing fell out of the envelope en route.
- Submit the checks, a photocopy of them, and a copy of the A & R Form, and indicate the dollar amount being sent. If you are mailing checks, notify the Treasurer by email, attaching this form.

**You must coordinate new member sign-ups with the Membership Secretary, and verify membership of ALL other participants. Send membership forms to the Secretary, checks to the Treasurer.**

## **B) Wait-list**

This is used to fill cancellations, or to add additional boats to the trip. Use your judgment here. There are almost always some cancellations, so it's wise to not let the wait-list drop below about 6 people (if it's even that big to begin with) when filling additional boats, until you get closer to the trip date. Adding boats is not automatic - it is based on boat availability, logistics of where you are going, and what you want to do. If you are interested in adding additional boats, contact the Charter Liaison, who will work with you to find additional boats of appropriate size, if available.

## **C) Cancellations**

If a confirmed participant notifies you of a need to cancel, that person may be entitled to some refund. For most trips, full refunds will be given for cancellations made 30 days or more before the trip departure date. The Club's standard policy is that cancellations less than 30 days before the trip, when no replacement is found, are not refundable, regardless of reason, even medical. There *may* also be a \$25.00 cancellation penalty when a replacement is found. Refunds may be paid at any time mutually agreed upon by the trip leader and Treasurer, as is the assessment of a penalty. Any unrecoverable costs not included in the trip price are generally not refunded. Some trips have different cancellation policies, which will be described in the trip write-up.

Replacing someone who cancels is done from the wait-list, if any. If the cancellation was a skipper or first mate, the next skipper/first mate on the list is elevated to confirmed status; otherwise the next name on the list is then confirmed on the trip. If a skipper cancels, and no more skippers are signed up, then some confirmed participants need to be notified immediately of the possibility of their being dropped from the trip, and why. The names lowest on the confirmed list, which represent a number equal to the crew of the smallest boat, are selected. Further, broadcast messages should be sent to ALL skippers seeking their participation.

In the event anyone cancels less than 30 days before the trip departure date and no replacement is available, he or she will also be required to pay any additional fees and charges that cannot be canceled prior to the trip in addition to forfeiting all trip fees paid to date. For trips that require a more stable crew list, stricter refund policies may be implemented. Trip participants are always advised to read all trip documentation carefully. Individuals will not be permitted to select their own replacement unless the wait-list is empty.

**BOAT CANCELLATIONS:** In general, the Charter Liaison needs to be notified at least 45 days before the trip date if any reserved boats are to be cancelled without penalty. As this coincides with the due date for final payments from the participants, you should have a reasonably good idea of your flotilla needs. Be sure to know the cancellation policies of the charter companies being used on your trip.

## **III) Performance Phase**

**A) Skippers Meeting** - Coordinate with the skippers on your trip to meet three weeks prior to your trip. This does not have to be an in-person meeting. The following items should be distributed to each skipper prior to, or at the meeting:

- Crew selection worksheet, showing first mates, preferences, etc.
- Information packet containing the following minimum set of documents, which, except for the contract, can be emailed ahead of the meeting:

<input type="checkbox"/> Contract	<input type="checkbox"/> Contract policy for skippers	<input type="checkbox"/> Charter Check-in/out form
<input type="checkbox"/> Crew Information Sheet	<input type="checkbox"/> Injury report	

- Include a copy of any other relevant information you may have, such as

<input type="checkbox"/> Tide tables, way points	<input type="checkbox"/> Waterway guide info	<input type="checkbox"/> Boat layouts	<input type="checkbox"/> Chart info
<input type="checkbox"/> Shore plan info (i.e. restaurant menus, museum literature, etc)			<input type="checkbox"/> Other

## B) After the Skippers Meeting

- Prepare final crew list. Please use template provided.
- Confirm pre-trip meeting date with the meeting location.
- E-Mail the following to all participants [including skippers]:

<input type="checkbox"/> Crew list	<input type="checkbox"/> Pre-trip meeting info/float plan. Please use templates provided
<input type="checkbox"/> Risk Advisory	<input type="checkbox"/> Skipper/Crew Responsibilities
<input type="checkbox"/> Crew Briefing Checklist	<input type="checkbox"/> Medical Emergency Information Form
<input type="checkbox"/> Packing List	<input type="checkbox"/> Menu Planner

- Finalize trip logistics (reservations, docking, etc)
- Prepare meeting presentation.
- If desired, coordinate getting checks for any planned expenses from the Treasurer. Otherwise you will have to pay for them yourself, and submit a reimbursement request after the trip.
- Remind crews of the things not included in the trip price, such as slips, meals ashore, provisions, etc.
- Review directions to the marina. Also, boat locations, if known.

## C) Pre-trip Meeting

- Collect any remaining Release Forms. *These are legal forms and will be retained by the Club for many years.*
- Distribute updated crew lists. Cancellations occurring after the skipper's meeting should be discussed with the skipper of the affected boat.
- Introduction of participants, especially for new members.
- Review trip itinerary
- Facilitate individual crew meetings where Skipper and First Mate are absent
- Review marina location and support car pool efforts
- Conduct question and answer period

## D) At The Boats

*Prior to Departure on First Morning of Trip:*

- Conduct skipper's meeting on the first morning.
- Ensure that skippers document any existing damage on check-in form. Have Charter company representative initial the Club's check-in form, and take photos. Collect remaining Release/Zero Tolerance Forms. **No one should board a boat who has not submitted a Release Form.**
- Conduct any last minute business with charter firm if needed (as directed by the Charter Liaison.)
- Help out with any boat/crew problems

*During the Trip*

- Conduct skipper's meetings regularly (i.e. at least each morning)
- Help out with any boat/crew issues

*After Returning the Boats:*

- Before leaving the marina, check in with as many skippers as possible to see if there were any new problems with boats and or crew. Also . . .
  - Collect any injury reports.
  - Collect check-in forms if possible. If any damage occurred, it should be documented on the form, and photos taken. Due to the likelihood of boats returning at different times, some skippers will mail the form directly to the Charter Liaison.

**IT IS THE TRIP LEADER'S RESPONSIBILITY TO SEE THAT ALL FORMS ARE RETURNED TO THE CHARTER LIAISON, WHETHER MAILED BY SKIPPERS OR NOT.**

**IV) Close-out**

The first part of this phase involves sending out a request to all participants requesting that they complete an on-line trip evaluation. Sample language is included in the library of files provided you. The link to the survey will be provided to you at the end of your trip. In addition, the trip leadership team is expected to compose a Trip Report for publication in the newsletter and on the website. Pictures would make for a better article. These are submitted to [news@thesailingclub.org](mailto:news@thesailingclub.org).

The second part of this phase is one of the most important administrative phases, as some of the documents involved either can protect the club or provide support for claims the club may have. Documentation goes to four individuals, the Commodore, the Treasurer, Charter Liaison and the Membership Secretary, as follows:

**Commodore:**

- Injury reports, if any.
- Final Crew List**

**Charter Liaison:**

- Check-in/out forms (those not mailed directly by skippers)
- Damage reports, if any. *These should be discussed **immediately** after the trip with the C.L.*

**Treasurer:**

- Remaining checks for deposit
- Expense Reimbursement/Refund request
- Final Crew List** and Release Forms, sorted by boat, Skipper's form on top.
- Financial Reconciliation verifying trip receipts and expenses.

**Membership Secretary**

- Final Crew List** and remaining membership forms.

***Contact Information for 2023-2024 Sailing Season:***

<b><u>Commodore</u></b>	<b><u>Treasurer</u></b>	<b><u>Charter Liaison</u></b>	<b><u>Membership Secretary</u></b>
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