

EDUCATIONAL TRAVEL COMMUNITY

Opening doors to open minds.



# Jumpstart Tutorial

## The Nuts and Bolts of Nonprofit Travel

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## Overview

- **Getting Started**
- **Tour Agreements and Contracts**
- **Faculty and Host Policies and Responsibilities**
- **Budgets**
- **Evaluation Forms**





## ETC Lingo

-ETC

-Sponsor/Travel Planner

-DOS

- Destination
- Tour Operator
- Inbound Operator
- Supplier

-PAX

-TD/TM

-FIT

-PIF

-Comp

-Commission

-Marketing Contribution

-Sponsor Catalogs

-FAM Trip



# Getting Started

## Establish purpose or mission of travel program

- What's important to your organization?
- Engagement tool? Revenue generator? Or both?

## Determine your targeted audience

- Alumni, donors, or both?
- How large is your alumni base?
  - If starting a new program, realize that you need a large enough base of alums who are likely to travel





## Tour programming

- What would work for your audience?
- Who develops and operates the tour?
  - Your organization or a tour operator?
  - Understand the risks and rewards of each?
    - It's usually better to establish a strong travel program using tour operators before branching out to design trips on your own

## Working with a tour operator

- Utilize ETC community
  - Network with colleagues
  - Check references
  - Check ETC website organization profiles
- Operators who work with alumni only or sell direct with a strong group department
- How many operators do you want to work with?
- Consider establishing a long term partnership





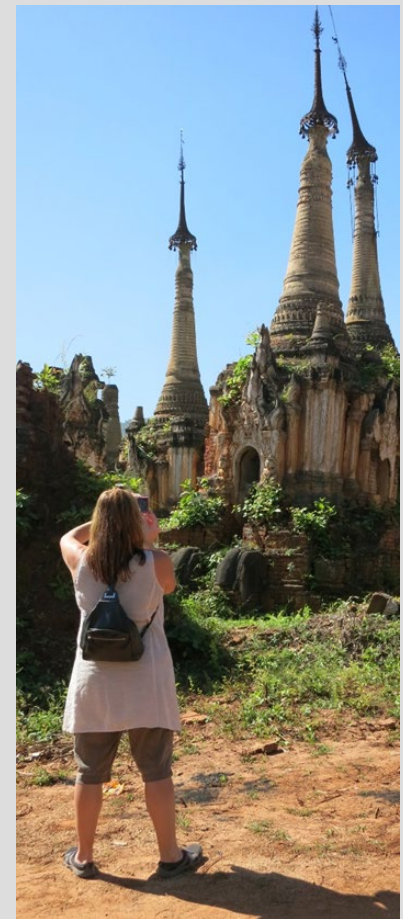
# Tour Agreements and Contracts

## What does your organization require with regard to documents?

- Check with your legal counsel
- Research industry standards
- Network with ETC colleagues
- Create a contract or tour agreement

## In your initial and annual conversations with tour operators, discuss:

- Responsibilities of tour operator
- Responsibilities of the travel planner





## Define responsibilities of the tour operator

- Develops itinerary: customized or off-the-shelf
- Handles all financial matters (tour billings, final payments, etc.)
- Creates marketing materials (brochures, email templates, etc.) or not?
- Coordinates all passenger logistics and tour materials
  - Pre-trip materials – what do they provide, when do they provide them, can you review the text?
  - Who do travelers call with questions?
  - Reservation process: who handles deposits?
  - Understand how the tour operator's office is set up to handle communication with your travelers.
    - Outline your expectations of customer service and follow-up between the travelers, the tour operator office and your office. Their company is an extension of your organization!
- Operates the trip
- Provides emergency contact numbers for all parties



## Define responsibilities of the travel planner

- Determines your goal for individual trips and your program
- Endorses and brands each trip
- Determines allotments min/max numbers, etc.
- Provides mailing lists (what happens to the list after use?)
- Assists with marketing the trip on your organization's website, in-house print materials, at events, etc.
- Reviews all tour operator trip materials

to ensure accuracy and consistency

- Is 'fine print' clear and reasonable?
- What forms does the tour operator require your travelers to sign? Are they easily accessible?







## Items Included in a Typical Contract or Agreement

- Trip dates, prices and names
- Allotments, co-shares, comps
- Handling and privacy of mailing lists
- Marketing: dates, plans and goals
- Risk management elements: indemnification, liability, severability, waivers, disputes, etc.
  - Who signs the documents?





## Tour materials: What does your program provide?

- Passenger information forms (PIFs)
- Release of liability
- Agreements with faculty speakers and hosts
- Emergency contact info to faculty or staff hosts





## Other Points to Include and/or Discuss

- Emergency communication plans
- Agreed upon tasks between you and other speakers or groups sharing departure
- Travel Insurance: travelers and staff or faculty
- Misc. outside items to check:
  - U.S. State Department Warnings
  - CDC Warnings
  - Cost comparisons of same or similar product on the web





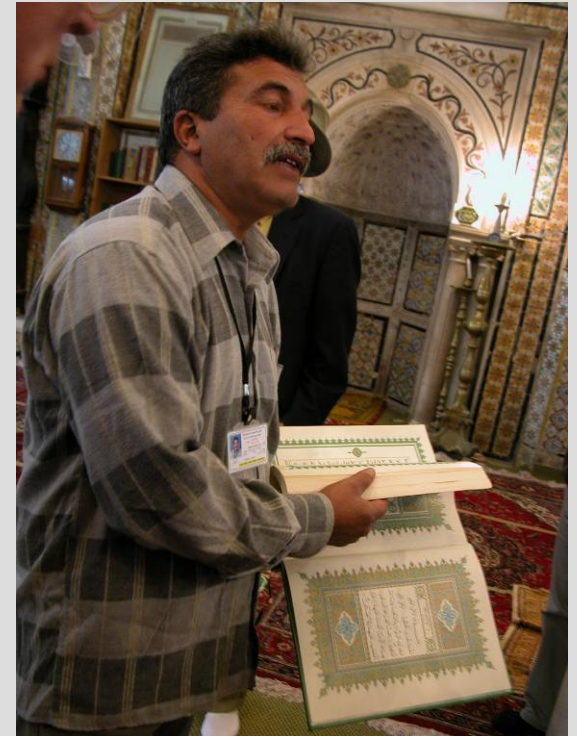


# Faculty Lecturers & Hosts

**What is the goal of your organization for these positions?**

**Important roles: individuals should be carefully selected**

**Provide a handbook: clearly define responsibilities**





## Role of Faculty Lecturer

- Positively represent the organization
- Assist with developing itineraries
- Give lectures and commentary to all travelers
- Accompany the group throughout the trip
- Develop a pre-trip reading list
- Arrange and host special events on tours







## Role of Host

- Positively represent the organization
- Create 'community' and connection during the tour (host parties, celebrate birthdays, etc.)
- Gather details about travelers for travel program or advancement purposes
- Assist the travel director as needed
- Provides special care when possible: single travelers, VIP's, health issues, etc.

## Other things to Consider

- How do you evaluate participation?
- What out-of-pocket costs are covered?





# Budgets

## Purpose of your travel program?

- Relationship-based
- Increasing memberships: a program or service for members
- Advancement or development focused

## How is the program funded?

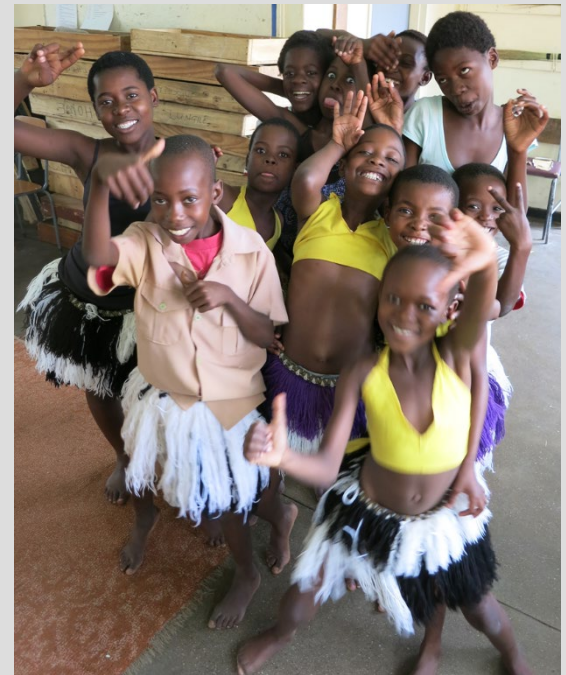
- Funded by organization
- Funded by income

## What are the budget goals for program?

- Break-even or make a profit

## Internal policies for income

- Taxable vs. Non-taxable





## Income: What's Included

- Tour commissions
- Travel insurance commission
- Marketing contribution from tour operator
- Other?







## Expenses



- Office overhead and salaries
- Marketing: in-house catalogs, etc.
- Host/faculty lecturer costs
- Mailings/pre-departure information to travelers
- On-tour receptions
- Tour/host supplies, tchotchkes, books, and traveler gifts



# Evaluation Forms

**Valuable tool for both the travel program and the tour operator:** *Decide who sends them out.*

- Collect feedback on included tour components
  - Overall rating of tour experience
  - Itinerary
  - Hotels and/or ships
  - Tour directors (individual guides, etc.)
  - Meals
- Collect data helpful for organization
  - Faculty lecturer or host
  - Testimonials
  - Do they feel more connected to the institution?
  - Future tour suggestions







## Next Steps

**Check out the other Jumpstart Tutorials on the ETC Website:**

- **The What, Why and How of Educational Travel**
- **Risk Management**
- **Marketing**
- **Learning the Industry Supply Chain**

