

Guidelines for Trip/Performance Coordinators

6 Months Ahead:

- Contact venue to discuss details of a potential visit.
- Remember to mention to venue that OLLI is a non-profit and costs should be tax-free. If venue needs a sales tax exemption form, the OLLI finance associate can provide it to you.
- Discuss potential dates with OLLI program associate.
- If event requires bus transit, fill out special event form to indicate date (even if you have no further details). Once you have all of the details, please provide them to finance associate so she can get the correct pricing for the bus. Finance associate needs 6 months lead time for securing buses for trips spring and fall term – 4 months lead time for securing buses for trips summer term. (We are competing with the county schools for bus reservations.)
- **Special event form link** (olli.gmu.edu; Quick Links; “Docstore”; Planning; Special Event Information Sheet): <https://olli.gmu.edu/bus-trip-performances-proposal-form/>

4 Months Ahead:

- Once you have full details of trip - logistics, costs, payments, payment due dates, etc. - please fill out and submit again the special event form (link above). This form filled out in full is critical to the finance associate in order to prepare checks and meet deadlines for your event.
- Forward contracts directly to finance associate. **Do not sign contracts on behalf of OLLI.**
- Please fill out OLLI form to request checks, available on the DocStore (olli.gmu.edu; Quick Links; “Docstore”; Finance and Donations; Check Request Form): <https://olli.gmu.edu/docstore/OfficeDocs/Check%20Request%20Form.pdf>
- Mail or deliver check request form to finance associate.
- **PLEASE** do not pay for anything out of your pocket. OLLI has a credit card and checks to cover all payments.
- Write catalog blurb with event details; email to program associate.

2 - 4 Weeks Ahead:

- Confirm with the venue the final details of the trip (venue will provide you with deadline for this) such as final head count and/or meal choices. As coordinator of the trip, you are assigned to the trip as an “instructor,” and as such, you can log into the member portal as an instructor and look at the roster at any time. If you have questions about this, contact the program associate.

10-14 Days Ahead:

- Coordinate with our registrar to pick up your trip packet which, in addition to rosters, will include emergency contact information, any needed checks and any needed meal information. This is generally ready 2 or 3 days before the trip.
- Send registered members an email through the member portal reminding them about the trip **only** if you have additional information/details about the trip you hope to convey. Otherwise, a trip reminder email will be automatically sent to participants by the office.

After the Trip:

- Return the information packet to the Tallwood office, including a roster showing those who attended, the emergency contact envelope, and the receipts for the bus driver tip after the trip.
- Please provide feedback, if any, regarding the bus company/driver to finance associate.