

Tours and Outings

POLICY

Tours and activities, an important part of the NW OCTA experience, may include trail hikes, trail marking activities, auto tours with participants communicating via CB, presentations by chapter members or guests, and occasional plane flights or bus tours. It is important for the chapter to be open to new ways to explore the trail, and offer varying types of activities, to serve the different interests of chapter members. General categories include:

1. Marking, mapping, on-the-trail, including training sessions

These activities support a primary OCTA goal of preservation. The chapter no longer sponsors National Park Service Challenge Cost Share events. Such events are typically planned and managed at the national association level by a small number of people (either within or outside the chapter) who prepare any materials needed. A chapter hosted mapping/marking event cannot be expected to do more than break even on costs. Often such activities will expend a significant amount of money. The chapter may be asked to provide reimbursement for some of the costs incurred.

2. Educational events held primarily outside, such as driving tours of a region

This type of event is expected to break even on costs. One-day tours or outings tend to be casual affairs planned by one or two chapter members who prepare the materials needed. Planners should avoid additional postage costs by putting notifications in the newsletter, or posting notices on the chapter and national website, or distributing reminders via chapter email. Outing attendees are usually asked directly for reimbursement for any costs of preparing the pamphlets or brochures.

3. Educational and entertainment events

The chapter annual meeting, trails day activity, or fall picnic, are usually indoor activities. Such events are designed to appeal to a larger number of chapter members and guests; frequently they will offer one or more formal speakers, meals on-site, opportunities for informal conversations with other chapter members, and the need for member overnight stays in the area. These occasions should

- a) balance the direct costs of the function;
- b) cover administrative costs such as supplies, postage, printing, and the chapter website; and
- c) provide funds to support chapter goals, such as preservation; and education.

The vice president sets the schedule of outings for the year, makes arrangements for field trips and outings, and requests NW OCTA members to participate as leaders or arrangers for activities in their areas. The vice president, after consulting with tour leaders, outing coordinators, and the chapter board, decides well in advance of the actual dates when tours and activities will occur.

TOUR LEADER RESPONSIBILITIES

If an activity is to be offered in cooperation with another historical organization for a fixed date, the vice president should be notified promptly so that it may be included on the schedule and to avoid scheduling a conflicting activity on the same date.

Major events should be well publicized in the chapter newsletters, on the national website calendar, and through chapter emails. Contact the newsletter editor and the person in charge of e-communications to arrange notices.

Tour leaders consider tour expenses, the number of attendees allowable, and possible handbook preparation; provide outing publicity; and work with the newsletter editor, treasurer, and the person in charge of electronic communications to distribute publicity and detailed information.

Whenever the public is to be invited, the tour leader sends special meeting notices to interested groups and to the local media.

The tour leader obtains **WAIVER FORMS** for outdoor OCTA-sponsored activities from the National OCTA website Members Resources section (<http://www.octa-trails.org/members/index.html>).

MANAGING EXPENSES

Chapter membership fees do not cover all the expenses and desired preservation and education activities of the chapter. In the past, Cost Share activities brought in donated money that could be used to support other chapter events and activities. Now, the chapter is in the position of having to have a cost replacement "plus" requirement for every non-marking activity that it does, to ensure that there will continue to be funds for education and preservation efforts. Planners should work with the treasurer regularly and carefully during preparations for the event to ensure that it will be able to cover all its costs, and make a profit.

Money earned by raffles and silent auctions held at an event are separate fund-generating activities and should not be considered as part of the event income.

If an event is planned outside of the two population corridors (Portland to The Dalles, or Eugene to Seattle)—

The individuals setting up the event should plan for somewhat smaller numbers, because fewer chapter members may be able to attend.

The per-person cost of the event should be increased to ensure that all the fixed costs (rooms, speakers, postage, printing and publicity costs) are covered, and a profit is still possible.

Additional outlays beyond the costs of food may add as much as a 50% markup to the fee that is set. Expenses will be greater beyond food costs--fixed costs-- if the number of attendees is expected to be small. Expenses beyond fixed costs will be smaller, perhaps only 33% more, if there is no hired transportation for the event.

INFORMATIONAL NOTICES TO CHAPTER MEMBERS

The tour leader prepares any specific outing instructions and submits them electronically or in paper form to the newsletter editor. An email may be prepared, as well, and submitted to the person in charge of electronic communications for distribution. The tour leader should ensure that information is submitted on time to be published well ahead of the tour or activity date.

PRE-REGISTRATION

Participant pre-registration provides the method for obtaining an attendee count for preparing and printing a booklet related to the outing, for determining the number of cars anticipated, for arranging the parking spaces needed at stopping spots, for the dinner count, and so on.

Reservation forms may be provided in the chapter newsletter or in a special mailing. Alternatively, the tour leader may choose to accept e-mails, letters, or phone calls to indicate registration. Registration is open to all without prejudice. (See “Publicity Checklist” following for suggested information to include in the pre-registration notice.)

Publicity Checklist

Publicity should include the following information, as appropriate:

- _____ 1. Outing title.
- _____ 2. Tour, event, or activity summary.
- _____ 3. Indication if pre-registration is necessary. Minimum or maximum number of anticipated attendees, if pertinent.
- _____ 4. Cost per participant including booklets and other fees.
- _____ 5. Who should receive pre-registration and pre-payment of fees. Instructions should direct those signing up to send the registration to the treasurer along with any money for booklets, lunch, or specific fees.
- _____ 6. Places to stay in the area (hotels/motels, or campsites).
- _____ 7. Places to eat in the area. Location of a group meal if there is one.
- _____ 8. Date, time and place to assemble. A map is helpful.
- _____ 9. Type of vehicle or footgear needed.
- _____ 10. What to bring (such as water, lunch, sun screen, mosquito repellent).
- _____ 11. Length of the drive and/or hike in time and distance.
- _____ 12. Other activities available in the area.

OUTING OR TOUR DAY

Each outdoor tour participant must fill out an OCTA waiver form at the start of the outing. (Obtain forms in advance from the OCTA national website.)

Enjoy!

FOLLOW UP

An “After Activity” report should be transmitted to the vice-president/activities coordinator within ten days of event end. Please indicate which comments/remarks may be printed in the newsletter.

1. Name of Event:
 - a. Event leader:
 - b. Location/disposition of waivers (if required):
2. Dates
 - a. Date of event:
 - b. Date of report:
3. Location(s) of event:
4. Number of participants:
 - a. Number of NWOCTA members:
 - b. Number of non-members, guests, family members, etc.:
5. Description of event proceedings, actions, highlights, etc.:
6. General comments of reporter concerning success/failure of event:
 - a. Positive aspects of event worth repeating in future events:
 - b. Aspects of event needing improvement if repeated in future events:
 - c. Aspects of event to be deleted in future events:
7. Quotes or comments (yours or others) worth mentioning/using in newsletter:
8. If you or any participant you are aware of or has an article/report about the event for the newsletter, please attach it or otherwise send it to the newsletter editor. Articles/reports are encouraged from more than one source.
9. If you or any participant you are aware of or has any photographs of the event for the newsletter, please attach them or otherwise send them to the newsletter editor. Photographs are encouraged from more than one source. Hard copies of photographs should also be sent to the chapter historian.