



**HANDBOOK**

**FOR**

**SIR BRANCH**

**TRAVEL CHAIRMEN**

**This Handbook has been revised by the**

**SIR Policies & Procedures  
Chairman, Dale Decker**

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## Definitions and Terms

Unless the provisions of the context otherwise require, the definitions used in the SIR Travel Handbook are:

- “Agency” means a SIR-Qualified Travel Agency listed on the SIR Website.
- “ATC” means Area Travel Coordinator as specified in Rule 388.
- “BEC” means Branch Executive Committee.
- “Branch” refers to SIR at the Branch level.
- “BTC” means Branch Travel Chairman, who is the member appointed by the Big Sir as Chairman of the Branch Travel Committee who is responsible to the BEC for the planning, promotion and conduct of duly authorized Branch travel events.
- “DM” (Designated Member) means the person designated to contract with an Agency to act on behalf of that Agency in connection with a specified travel event sponsored by a Branch or State Committee.
- “GL” (Group Leader(s)) means the active members(s) of a participating Branch selected by BEC of the sponsoring Branch or State Committee designated to accompany, escort, guide or supervise the participants throughout a specific Branch or State travel, bowling or golfing event. The BTC or DM may also function as the GL if so selected.
- “Personal Gain” means anything of value received by a member, BTC, DM, or GL, his spouse or dependents, directly or indirectly, from an Agency or supplier arranging, presenting, or providing travel in connection with a travel event.
- “SIR” refers to SIR, at both the Branch and State level.
- “SIRinc” refers to SIR, Incorporated, at the State or Corporate level.
- “State” refers to SIRinc, the State Organization or State Corporation.
- “STC” means State Travel Committee
- “Travel Literature” means any and all printed or written material, including VHS tapes, DC’s and DVD’s, containing a reference to a travel, bowling or golfing event that is distributed or caused to be distributed by a Branch, the State or State Committee, including a Branch Bulletin or SIR Happenings.
- “Travel Event” means any event involving travel authorized by the State Board or BEC, excluding “Branch or State Bowling or Golfing Events” involving travel, which also must be authorized by the State Board or BEC.
- “Guest” means a SIR non-member other than participating wives, companions and relatives of participating active members, and widows of deceased members. A “relative” is defined as a parent, sibling, child or grandchild of a participating member or companion.

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## Handbook Information For SIR Branch Travel Chairmen

The purpose of this Handbook is to provide one publication that contains all the essential information a SIR Branch Travel Chairman requires to plan and execute a SIR Travel Event within the Policies & Procedures of the SIR Manual.

SIR Travel consists of Policies & Procedures that have been written specifically to cover SIR Travel Events. Every SIR Travel Event must comply with these Policies & Procedures.

This Handbook, the SIR Manual, all travel related Forms and lists of Qualified Travel Agencies and Qualified Bus Companies may be downloaded from the SIR Website: <http://www.sirinc.org/MemInfo/>

It is the Travel Chairman's responsibility to maintain the Handbook with all updates. In the event the Travel Chairman vacates his position he must transfer the Handbook to his replacement. If a replacement has not been appointed he must transfer the Handbook to the Branch Secretary. Travel Chairmen are encouraged to make additional copies of the Handbook for Branch Travel Committee Members.

The insurance carrier that covers SIR has a copy of the relevant SIR Policies & Procedures. It bases the insurance premium SIR pays on the risks involved in the various SIR activities. SIR Policies & Procedures reduce these risks considerably and therefore, the premiums SIR pays are reasonable.

In the event that an incident occurs during a SIR activity which results in litigation and if SIR Policies & Procedures were not complied with, the insurance carrier could deny coverage. You, your Branch Executive Committee and SIR could be held liable.

**This Handbook and Travel Event Checklist Form 59 should be used by all Travel Chairmen, novice or experienced. Following the procedures outlined in this Handbook and Form 59 should minimize the possibility of violating SIR Policies & Procedures.**

## Sir Policies & Procedures

SIR Travel consists of Policies & Procedures in the SIR Manual that control SIR travel events. Specifically, Policies 13, 31 and 39 along with Procedures 12 and 13 control all travel events. The SIR Manual may be viewed or downloaded from the SIR Website: <http://www.sirinc.org/MemInfo/>, (Member's Information), then select SIR Manual under the 'Key Documents' header.

Follow the instructions displayed, by the website, on your monitor to obtain the information you desire. You will need Adobe Acrobat Reader 3.0 or greater to view or download any data.

If you need the reader go to <https://get.adobe.com/reader/> but tread carefully as several 'boxes' will be 'checked' which if left that way will cause three or more other programs to be installed on your computer. Be sure to 'uncheck' these and and only click on 'Download Acrobat Reader'.

**Travel Chairmen are advised to periodically check the website for Policy and Procedure revisions.** Each page has a revision date at the bottom of the page.

**SIR Forms:**

Forms provided through the State are controlled by the State Executive Committee. No creation or elimination of or amendment to such a form shall be effective without being first approved by the State Executive Committee.

**Alcoholic Beverages:**

Alcoholic beverages may be served or provided, whether or not for compensation only when there is full compliance with all federal, state, and local laws, rules or regulations.

**Breach of Policies & Procedures:**

The breach of any SIR Policy, Procedure or By-Law or refusal to conform thereto, may be cause for membership termination or suspension.

**SIR Logo and Emblem**

The logo of SIR, Incorporated, as displayed on its official letterhead, is registered as a copyright under the laws of the United States and may be used only as authorized as provided in the Procedure 9 - "How To Use The SIR Logo and Emblem. It shall not be authorized for display on any item produced, handled or sold for the personal gain of any member of SIR, Incorporated.

**Suspension of Activities:**

The Regional Director has the authority, subject to an appeal to the President, to suspend any activity of a Branch within his Region which he finds to be in violation of the Corporate Articles of Incorporation, Corporate By-Laws, Policies & Procedures or the Branch By-Laws.

The Big Sir is an ex-officio member of all committees except the Nominating Committee on which he shall not serve in any capacity.

The Little Sir may be a member of any committee except the Nominating and Travel Committees on which he shall not serve in any capacity.

## **SIR Qualified Travel Agencies and Bus Companies Notice to Travel Chairmen**

The list of SIR Qualified Travel Agencies is updated periodically by the SIR State Travel Committee. The list is **not** enclosed in this website version of the Travel Handbook. Branch Travel Chairmen can obtain the most current list is available from <http://www.sirinc.org/MemInfo/>, (Members Information), then select Qualified Travel Agencies or Qualified Bus Companies under the Travel Management Information header.

The SIR List of Qualified Agencies provides a listing of the only travel agencies who may do business with SIR.

**Do not give this list to any agency.** The list is updated as necessary. If you have any questions concerning insurance matters contact the Chairman of the SIR Insurance Committee. His name, address and phone number is listed in the list of SIR Qualified Travel Agencies.

If the agency you want to use is not on the SIR Qualified list you, the Travel Chairman, must provide the agency with a copy of SIR Form 59A which is available from the SIR Website.

To be SIR Qualified a travel agency **must have** a California Seller of Travel License and Identification Number: CST # Number. SIR requires that travel agencies must have a CST # Number for **any** SIR Travel Event. It is the Travel Chairman's responsibility to obtain from the travel agency their CST # Number and include that number on the SIR Form 53, Request for Approval for a Travel Event, which he submits to his Branch Secretary and State Travel Chairman.

# Recommended Procedures For Travel Events

The following procedures may be used as a sequential guide in the process of planning, promoting, conducting and accounting for a SIR Travel Event. The Form 59 Travel Event Checklist covers all these procedures.

## Step 1: Travel Agency Qualification

When you decide you want to plan a travel event check the list of Travel Agencies that are SIR Qualified for insurance coverage and have a California Seller of Travel Certificate.

The most current list is available from <http://www.sirinc.org/MemInfo/>, (Members Information), then select Qualified Travel Agencies or Qualified Bus Companies under the Travel Management Information header.

**Do not give this list to any agency.** The list is updated as necessary. If you have any questions concerning insurance matters contact the Chairman of the SIR State Insurance Committee. All the other requirements are under the control of the SIR State Travel Chairman.

If the agency you plan to use is not on the SIR Qualified list you, the Travel Chairman, must provide the agency with a copy of SIR Form 59A, California Seller of Travel, or SIR Form 59B, Bus Company Operator, which will have to supply the required information needed to qualify as a SIR vendor.

Do this during your first visit to or contact with an agency that is not qualified. It may take considerable time for the travel agency's insurance carrier to send the necessary documents to the SIR Insurance Committee Representative. You cannot do business with a travel agency until they are SIR Qualified.

Give the agency a copy of SIR Contract Form 50, Branch Travel Event, SIR Contract Form 50B, State Events involving Travel, as applicable and a copy of SIR Form 59A, California Seller of Travel, or 59B Bus Company Operator, letter to travel agencies seeking to be SIR qualified.

## Step 2: Planning a Travel Event.

If you are undecided about where or what kind of event would be of interest to you or your Branch members, go to an agency and pick up some generic brochures of various events and destinations they are promoting. Review them at home and pick out the brochures you think might be of interest to your Branch membership. Show them to the membership and determine which event received the most interest.

**You cannot at this point sign up or take any deposits from potential participants.**

If you are sure this is the event you want, go back to the agency. Obtain specific prices, itineraries, destination, duration and other details.

**You cannot make any commitments or agreements with the travel agency at this time. You must obtain approval for your proposed event from the Branch Executive Committee.**

Complete a SIR Form 53 Request for Approval of a Travel Event and submit it to your Branch Executive Committee for approval. If your request is approved proceed with the next step.

### **Step 3: Contracts**

SIR has contract Form 50 for use with travel agencies. When you have received approval of your Request Form 53 you should go to the travel agency to sign the appropriate SIR Contract Form. The SIR contract provides legal protection for you and SIR. It does not list all the details for the event. SIR Contracts cannot be altered in any manner. Only the SIR State Executive Committee has the authority to change or alter any SIR Form.

**You and the travel agency must sign the SIR Contract before you sign their contract.**

There are various clauses in the SIR Contracts that the agency or company may be reluctant to sign. That could be a problem if you have already signed their contract and they refuse to sign the SIR Contract.

The travel agency will have its own contract that you will be required to sign. It should contain all the details of the event and costs. In some cases the per person cost of the event is based on achieving a specific number of participants. If that number is not achieved the agency has the option to increase the per person cost. In that type of event you should insist on a clause in the agency contract that specifies a deadline date by which you can cancel the event due to insufficient sign ups, without any financial penalties to you and participants who paid deposits for the event.

Ensure that everything you agreed to is in the contract. Before any brochures are printed or distributed proof read draft copies very carefully. Ensure that there are no differences in what is written in the brochure or flier and what is written in the contract.

Before the brochures or fliers are distributed, resolve any differences, in writing, if necessary. Do not distribute or authorize any brochures or fliers to be mailed if they do not conform to the contract. Ensure that the wording complies with the following is included in the brochures or fliers:

No Branch shall participate in, or publicize in any way, any travel event of another Branch unless it has been duly authorized by the BEC of the sponsoring Branch. All travel literature shall clearly state which Branch is sponsoring the event. No Branch shall participate in, or publicize in any way, any State travel event or State Bowling or Golfing event, unless it has been approved by the State Board.

No Branch shall sponsor, announce, or publicize or promote a travel event or circulate or distribute information or literature concerning the event where it is indicated in any way that a Branch is sponsoring, or that an Agency is proposing, planning, arranging or presenting the event for all members of SIR or for all Branches of SIR unless the event has been authorized as a State event by the State Board.



The publicizing of a Branch travel event shall be confined to the Branches within the Area of the originating Branch. Where the travel event is originated by a Branch in two or more contiguous Areas formed it shall be chaired by the BTC that arranges the event and is responsible for the BTC approval.

The publicizing of the event shall be confined to the Branches within the Areas involved. This rule does not apply to Branch travel events publicized in SIR Happenings.

The copyrighted logo of SIR shall be used only as prescribed in Policy 9 and procedure of the SIR Manual.

Travel events offered for active members of SIR shall not be offered to the general public or any other organization. Travel events are only for members of SIR, their companions, relatives and their guests. In promoting a travel event a simple statement such as "...travel event is open to members of SIR only and their guests" should be used.

The wording in any travel literature shall disclaim any liability on the part of SIR. Travel literature concerning any travel event arranged by an Agency should clearly identify that Agency as the entity presenting the event with a statement such as "... Branch No ... sponsors this (identify the event) arranged by the ...Travel Agency." The travel literature must indicate that the travel agency is a registered seller of travel and display its registration CST # number.

Travel literature may indicate that a Branch is sponsoring a travel event, but in no instance shall the literature indicate that the Branch is "arranging" or "presenting" the event.

All travel event fliers, brochures and application forms shall specify exactly how check or money orders are to be drawn for each travel event. SIR Branch, Area and Region Travel Bulletins or announcements that briefly describe a travel event may refer to the payment procedure in general terms.

Each item of travel literature arranged for SIR and its Branches shall legibly display the following wording:

All travel events and other activities sponsored by SIR, Inc., or its Branches, are for the convenience and pleasure of the members and their guests who desire to participate. A relative of a member (meaning a parent, sibling, child or grandchild) and their companions and the widow of a deceased member may also participate. However, the number of guests participating in a SIR travel event shall not exceed the total number of members, plus participating wives, companions and relatives.

SIR, Inc., and its Branches do not assume any responsibility for the well being or safety of the participants or passengers, or their

property or damages whatsoever, in any manner pertaining to said travel events.

Where the travel literature is prepared by a travel agency, the following words shall be added to the above wording:

Any other 'disclosures' or non-responsibility provisions contained herein shall not in any way incur any liability attaching to SIR, Inc., or any Branch thereof.

While the BEC is primarily responsible for the enforcement of this Code in accordance with its provisions, each member of SIR has the privilege of reporting any violation of which he becomes aware to the Chairman of the State Travel Committee. In reporting such a violation the chain of Corporate Communications shall be followed, subject to the right of the member to communicate without regard to the chain of Corporate Communications in the event that no action is taken on the matter within a reasonable time.

The President shall consider all alleged violations of this code that have not been acted upon by a BEC in a timely manner that are reported to him and he shall cause an investigation and review of the matter to be made by the State Travel Committee Chairman. Upon determination that a violation of the SIR Travel Code has occurred, the President shall take such action as he deems appropriate including, but not limited to, removal from office or termination of the membership of the offending party, and suspension of the Branch Travel Program for failure to monitor it properly.

No Branch shall participate in, or publicize, a travel event offered or otherwise presented by an Agency during such period of time that the Agency is found by the President, with the concurrence of the State Executive Committee, to be in violation of any provision of the SIR Policies & Procedures.

**Now you can sign up potential participants, solicit deposits and advertise the event.**

The handling of all funds, deposits etc. shall be in compliance with the following:

Participants in a travel event shall pay all costs for goods and/or services received. Payment may be made by credit card, check or money order made payable to, and delivered to, the Agency or Branch, as determined by the BEC or State Board for the event.

A reasonable amount may be added to the cost of a travel event to be made available to the DM or GL for the purpose of meeting unanticipated needs, emergencies and special activities directly related to the event. Examples of unanticipated needs are: transporting a participant by taxi to a hospital if other transportation is not available, transportation to government offices to resolve a problem that occurred during an event, and telephone calls to a participant's family in the event of illness or injury. Special activities could be a party near the end of an event, or some other activity in which all participants are included. Add-on funds may only be

used during the dates that the travel event occurs. The funds cannot be used to pay for services that are the responsibility of the travel agency and are included in the travel agency contract -- such as excursions, activities, transportation, accommodations, step-on guides, nor for personal sight-seeing tours selected by individual participants. A reasonable add-on fee shall not exceed \$50 per participant.

All funds paid directly or indirectly by an Agency to a Branch for a travel event for the purpose or purposes designated by the Agency shall be made by check payable to the Branch DM for the travel event. The funds shall include, but not be limited to, money handled by the designated escort to pay for non-prepaid travel expenses such as gratuities, entertainment, parties, unexpected expenses, fees and the like. Such funds do not include refunds or the like paid directly from the Agency to the participants.

Upon termination of each travel event, all unencumbered travel funds that are subject to the control of the BTC shall either be expended as a refund to the participants in a proportionate manner, or expended on an appropriate activity that directly benefits the participants of that travel event, in a uniform manner.

Any such funds remaining that amount to less than \$5.00 per participant, shall be turned over to the Branch Treasurer as unencumbered surplus travel money.

Within 30 days of the termination of each travel event, the BTC shall submit to the Branch Treasurer SIR Form 52, along with any unencumbered surplus travel money as noted below, setting forth in detail all receipts and expenditures of funds received by him.

The report of the SIR Form 52 shall include copies of documents supporting monies received from the Agency and receipts for all expenditures except gratuities and refunds to participants of excess funds. The report shall include a statement setting forth any deviations from the travel services and the accommodations actually provided and those contained in the proposal as approved, the financial or other adjustments made for such deviations and the BTC's statement as to the reasonableness of the adjustments.

#### **Step 4: Mandatory Insurance Collection Fee for Foreign Travel**

SIR pays an additional premium to provide insurance coverage for travel events outside the United States, Canada and U.S. Territories and Possessions (Puerto Rico, Guam, US Virgin Islands, Northern Mariana Islands and American Samoa) which are exempt from this fee. Currently, a \$27 insurance additional premium shall be included in the fare to be paid by each participant contracted.

This additional premium must be added to the fare each participant pays for events that travel to foreign destinations. It is the responsibility of the Branch Travel Chairman to notify the travel agency / seller of travel, before he signs a contract, to include those fees in the advertised fare of each participant.

The agency / seller of travel must then remit the insurance fees collected to the Branch Treasurer no later than the departure date of the event. The Branch Treasurer in turn must forward those fees to the SIR State Treasurer with a completed SIR Form 51 within 7 days of receipt of the fees. The amount of the fee is subject to change by the SIR State Board of Directors.

### **Step 5: Financial Report Form 52**

Upon completion of any travel event the Travel Chairman must submit a completed Financial Report SIR Form 52 to his Branch Treasurer, Branch Secretary, and Chairman of the State Travel Committee. This report must be submitted within 30 days of the termination of each travel event, the BTC shall submit to the Branch Treasurer a SIR Form 52, along with any unencumbered surplus travel money that are subject to the control of the BTC that are not otherwise expended as a refund to the participants in a proportionate manner or expended on an appropriate activity that directly benefits the participants of that travel event, in a uniform manner. Any such funds remaining that amount to less than \$5 per participant shall be turned over to the Branch Treasurer as unencumbered surplus money.

The report of the SIR Form 52 shall include copies of all documents supporting monies received from the Agency and receipts for all expenditures except gratuities and refunds to participants of excess funds.

The report shall include a statement setting forth any deviations from the travel services and the accommodations actually provided and those contained in the proposal as approved, the financial or other adjustments made for such deviations and the BTC's statement as to the reasonableness of the adjustments.

### **Additional Responsibilities**

1. The Branch Travel Chairman should strive to have an adequate orientation meeting to answer participants travel questions. He must provide a competent and qualified escort for each event.
2. Travel events which would not be feasible for Branches acting independently, may be arranged by an Area or Regional Travel Coordinating Committee.
  - Conflicting dates within an Area may be avoided.
  - Avoid duplication of travel events.
  - Provide assistance in the selection of travel events.
  - Provide a forum to exchange information received from Officers and review problems other travel chairmen have experienced.
  - Permit experienced travel chairman to tutor novice committee members in the various aspects of handling a travel event
  - Provide an opportunity for Branches to list their travel program in an Area Travel Bulletin that is distributed to all Branches in their Area.

This can attract additional participants who are interested in an event different from what their Branch is offering.

3. Single participants paying for a double occupancy room should not be required to share a room with another participant.
4. Medical Insurance: Participants in travel events to distant destinations should be encouraged to obtain Medical and Emergency Medical Evacuation Insurance.

### **Familiarization Trips (FAM Trips):**

All FAM Trips must be approved by the Branch Executive Committee.

They are offered by suppliers through travel agencies to recipients free or at reduced fare. The purpose of the FAM Trip is to promote their services. While accepting a FAM Trip may not impose a legal obligation on the part of the recipient it is difficult to avoid the moral obligation that may result. Travel Chairmen should not accept a FAM Trip unless there is a reasonable expectation that a request for a tour to that destination will be submitted to the Branch Executive Committee for approval.

There are travel prohibitions associated with accepting a FAM trip from a supplier as noted below:

No BTC, DM or GL involved in a SIR travel event shall receive or accept any personal gain from travel other than free passage or reduced fare passage, as remuneration or compensation for ongoing travel arrangements, duties and/or responsibilities as specified by SIR and/or the travel agency contract. This Policy also includes Familiarization trips when such travel has been expressly authorized by the President or BEC in accordance with the SIR Policies a & Procedures. The above provisions also apply to Branch and State travel, bowling and golfing events when such travel has been expressly authorized by the President or BEC.

No member or BTC shall present or vote on any travel proposal to the BEC or State Board, nor be designated as a DM or GL for a travel event if the member or BTC, his wife or companion or relative has any financial interest in, or is an employee, agent or representative of an Agency that will be providing services for any portion of said event.

Acceptable forms of remuneration by Travel Agencies for SIR travel events are free or reduced fare passage or a dollar percent per person based on terms negotiated with Travel Agency Contract

## Guide for SIR Travel Escorts

One of the definitions of the word “escort” is a person who accompanies another person for protection, guidance and courtesy on a journey. You, as a SIR Tour Escort, have that responsibility. You as the leader of your group, have to be the secretary and treasurer who must keep records of everything that occurs on the tour and of all financial transactions that occur relating to the tour. You are the diplomat who must try to keep everyone on the tour happy and still deal with the tour operator, local guides, bus drivers, airlines, cruise lines, railroads, hotels, restaurants, customs and everything else that may occur.

This can be hard work. You may have to get up early in the morning and not go to bed until very late in the evening, but that is your job. Remember every SIR and his guests are your responsibility and that is the reason you are the escort. Take care of them as you would a family member, or a close friend, especially in difficult situations.

You never know what to expect when you begin a tour. Everything may go smoothly with no problems, but it can also have many problems. You will never know how you will react to problems until they happen. Make a list of things that could happen during a tour and plan what course of action you would take. If you find yourself in a situation where your plan doesn't work, be calm, use your best judgment and improvise. Talk to other experienced SIR Escorts about the problems they may have experienced, how they handled them, and if the results were satisfactory.

Having mentioned the above, it is good to know that today most Travel Agencies have Professional Tour Directors on staff or available to assume all of the above duties, leaving you more time to spend with your member guests. It doesn't hurt to be prepared just in case you are needed.

A word of caution in these times of turmoil throughout the world: Travel agencies usually do not discuss the safety of the destinations you are planning to visit. **If your tour destination is outside the United States it would be advisable for you to contact the State Department to determine if there is a travel advisory for the countries you plan to visit.**

### Communication and Social Graces

Mix socially with your tour group. Do not show favoritism, treat everyone equally. Be tactful and courteous to your group and to everyone you have contact with. If there is a question or disagreement about something, be calm and use your best judgment. Do what you think is correct. Be firm in making your decision. Be polite when you explain the reason for your decision. Never lose your temper, be calm even though you may be irritated.

### Leadership

You are the leader of your group. Be resolute and self-assured, do not let anyone else try to dictate how you should do things. To permit that would weaken your leadership. Be in firm control of your group but do not be overbearing. Your group is composed of adults who have had varied careers, many

with great responsibility, treat them accordingly. If things are not going according to schedule, and you are having problems, don't be pessimistic. Show optimism outwardly that you will solve the problem and this will be reflected in the attitude of your group. Remind your group that if they have any problems, they should contact you immediately.

## General Information

- 1 Contract compliance: The tour escort must ensure that all the conditions of the tour as described in the contract and the travel event brochure are fulfilled. Take extra copies of the contract and tour brochures with you.
- 2 Guide books: Obtain guide books of your tour destinations to help you familiarize yourself with those areas. You may be asked questions about the tour destination by some of your participants. The information you obtained from the guide books will help you avoid the embarrassment of not being able to answer those questions.
- 3 Currency: Obtain information on the currency exchange rates for the countries you will be touring. You may wish to recommend a one-time currency exchange for the entire group to save some exchange fees for all the participants.
- 4 Documents: Do not forget to take with you hotel confirmation letters and other documents you may need for restaurants, theaters, local tour operators etc. You may need them to settle errors, omissions and disputes.
- 5 Telephone numbers: Obtain from the travel agency handling your tour, a list of his 24 hour hot line telephone numbers for both domestic and foreign destinations.

The agency should also provide you with the names addresses and telephone numbers of every hotel, bus company, local tour operator, airlines and any other parties you will have contact with during the tour. If you have any problems you cannot resolve with them do not hesitate to phone the travel agency back in the United States.

- 6 Log book: Maintain a log of everything that occurs during the tour such as the quality of hotel accommodations, quality of service, condition of buses, knowledge of local tour guides, caliber of the bus driver, airlines, railroads etc. This information will be critical in settling any disputes over those things that were not in conformance with the contract.
- 7 Financial records: Keep accurate financial records of any amount of money that you spend related to the tour. You will have to account for it on SIR form 52. If you have a problem where you have to pay for something that was supposed to be included in the
- 8 contract you will need your records and receipts to resolve the financial dispute when you return home.

- 9 Lost passports: They are a problem. Attempt to determine where the participant may have lost his passport. Have him backtrack his actions to where he had been, hotel, restaurants, bus, theater etc. If he is unsuccessful in retrieving the passport contact the nearest American Embassy or Consulate. They may require a proof of loss statement from the police and a witness statement from a person with a valid passport who was on the tour with him. This will probably be you. This could take a full day to resolve. It is a good idea to have a copy of your passport, credit cards and any other important documents in your baggage. They will help prove that you had a passport in the event it is lost or stolen.
- 10 Tickets: Tickets should never be left in baggage. Tickets should be kept by the participant at all times unless he chooses to put them in the hotel safe at the front desk. Upon departing from the hotel, remind the participant to retrieve anything he may have put in a hotel safe.
- 11 Lost or stolen articles: Cash, credit cards and travelers checks are the individual's responsibility. Those participants who have travelers checks should keep the check numbers list separate from the checks. Credit card companies each have an 800 or international collect call phone number to report lost or stolen cards. Those phone numbers and the card number, should be kept separate from the card.
- 12 Baggage: Lost baggage or severely damaged baggage can be a serious problem. You must assist any of your participants in preparing a claim with the carrier, hotel or other entities responsible for the loss or damage. Try to obtain some form of monetary compensation to carry the participant over until his baggage arrives or a final settlement made. Make your baggage unique, mark it with colored tape, it will be easier to identify.
- 13 Illness: Participants are expected to provide their own medical coverage. Medicare does not cover those who have an illness or accident outside the United States. Many private health insurance companies cover their members in foreign countries. Medical evacuation insurance is usually available through the travel agency you contracted with to do the tour. This option usually must be selected at the time of signing up for the tour. If someone in your group becomes ill while at a hotel or on board a ship a doctor can be contacted quickly. On an airplane or train contact the chief steward or the conductor, they will contact the necessary people. If illness happens on a bus, head for the nearest hospital. If the participant needs hospitalization the tour escort should accompany him., and rejoin the tour group later.
- 14 Death: There is no standard procedure for handling the death of a tour member. Every country has different laws governing the disposition of a deceased person. Those laws are subject to change, and what may have been acceptable last year, may not be acceptable now.



- 15 Cruise lines do not want to discuss their policy for handling deaths. There are several possibilities that might be available for disposition of the deceased: Burial at sea, keeping the body on the ship in cold storage, or transfer to an airplane at the next port of call.

Aircraft: If death occurs in an airplane the pilot will radio ahead, to the nearest airport, to notify authorities.

Responsibility: When death occurs in a foreign country, the tour escort should contact a doctor and notify the American Embassy or Consul. The Embassy or Consulate Official will discuss with you or the spouse/companion of the deceased, the required procedures for disposition of the body and contacting next of kin, etc. If the next of kin request the body be shipped back to the United States by air, they will be charged for priority freight. This, plus a sealed coffin and other services required by that country's government, can be very expensive and must be paid for in advance. Perhaps the least expensive and least complicated method of getting remains back to the United States is to opt for cremation.

- 16 Tips / Gratuities: This is a necessary part of travel. They are rewards for good or outstanding service. Do not over tip. You are spending your participants' money. Spend it wisely. If your group does not receive the level of service expected, then you should not provide the normal tips. Tip what you think is appropriate.

Tips should always be included in the cost of an event. Whether you are dealing with a travel agency or just chartering a bus, always include the tips in the cost each participant pays for the event.

The participants, not the travel agency, pay for the tips. If the event is advertised as including tips the travel agency adds this to the cost each participant pays for the event. The agency then provides that money directly to the service provider or to the tour escort to use for that purpose. You could have a combination of both methods. If you have the agency add extra money for special activities that you, not the agency, plan on providing to the participants, include money for the necessary tips in the cost of your extra activities.

Keep tip money separate from funds the travel agency provides for you to pay for specific purposes such as a Step On Guide. You must have a clear understanding with the travel agency as to who must be paid for specific purposes and the exact amount of money that is to be paid in each case. Require the travel agency to include in its contract, that if the service is substandard, you will use your own discretion in the awarding of tips. Any surplus tip money shall be returned to the participants in the event.

You have to consider how many people you will have to tip and what amount to give to each person for the service received. The number of people you tip depends on your destination, the duration of the event, the modes of transportation, the type of accommodations, tour buses,

step-on guides, baggage handlers at depots, station, airports, hotels and other unexpected services.

## Travel Event Check List

1. Prepare a roster of all the participants in your tour. Provide a copy of the roster to each participant during the tour orientation meeting or mail it to those who could not attend the meeting.
  - a. Prepare a "Reminder Sheet" that should be mailed to all participants prior to departure of the tour. This sheet should have any special instructions you or the travel agency discussed at the orientation meeting. It should also have at the beginning of the sheet, two important reminders:
  - b. Do not pack your tickets, passport, money and credit cards in the baggage you will be checking in at the airport.
2. In your carry-on baggage you should pack those items you would need to have with you for an overnight stay in the event your checked baggage is lost or delayed. This should include prescription medicine, extra eye glasses, electrical plug adapters, etc.
3. Distribute a "Medical Information Sheet" to each participant. Explain to participants that it is not mandatory to fill out the sheet. You are requesting the information. It will only be used in the event of illness or an accident and would only be provided to medical personnel if they requested it. Assure them that it will be kept confidential and destroyed after the tour is completed. Keep those sheets in your possession. Keep them confidential. Destroy them at completion of the tour.
4. Confirm and reconfirm the dates, times and the location of all transportation events, bus, train, airline etc. In the event that bus transportation or a local tour guide does not arrive within 15 minutes of the scheduled time, phone them immediately to determine what has happened.
17. Use your roster to take a head- count of your tour group before you depart from any location and again when you reassemble your group at the next stop.
18. When baggage handling is involved, use your roster to log in the number of pieces of baggage each participant has checked in at the start of the tour. Do a baggage check every time the baggage is handled on or off a mode of transportation. Insist that participants notify you if they add or dispose of any checked baggage. This will avoid confusion in the total baggage count.
7. Never leave baggage unattended. If you have to attend to other duties, ask one of the participants to guard the baggage.
8. If baggage is lost, stolen or damaged assist the participant in filing a claim as required by the carrier. Help him obtain an allowance for personal needs pending return of his baggage or final claim settlement.

- 9 Upon arrival at an airport, ensure that everyone gets checked in. Advise them to check their tickets to be sure that the ticket clerk did not remove the wrong ticket.
- 10 On any local bus tour take a seat directly behind the driver where you can communicate with him and have access to the announcing system microphone.
- 11 Before leaving any common carrier, inform the participants of a meeting place.
- 12 At each stop on the tour, locate and advise the group of the location of the rest rooms.
- 13 Upon arrival at a hotel where the group will be staying overnight or when boarding a ship, obtain a list from the desk clerk of each participant's room number. Provide each participant with your room number. When checking in at hotels have the group stay in a designated place while you obtain the room assignments and keys. Advise the group of the location of the hotel restaurant and the time and place of any meals included in the tour. Issue the room keys and advise the participants of the evening schedule and the next day's schedule. If you have printed schedules distribute them to the group.
- 14 When entering another country, advise the group of the procedure for going through Customs and immigration. Inform the group of a place to meet after clearing customs and immigration.
  - a. Count heads and baggage.
  - b. Contact a porter to handle the baggage.
  - c. Count baggage each time it is loaded and unloaded.
  - d. Contact bus company and local guide if they are not there waiting to take your group to the hotel.
- 15 Advise the group to contact you if they have any problems.
- 16 At the end of each day's activities, when you are returning to the hotel, brief the group on that evening's event if any is scheduled and of the schedule for the next day. If you have a printed schedule, distribute copies to the group.

## **SIR Travel Forms**

SIR Travel Forms may be downloaded from the SIR Website:

<http://www.sirinc.org/MemInfo/> by selecting Sir Forms under the 'Key Documents' header. Following is a list of all travel related forms:

Form -

- 46 Request for Approval of Branch Bus Trip
- 47 Short Bus Trip Financial Report
- 48 Branch Bus Trip Checklist
- 50 Branch Travel Events Contract Form

- 50B State Events Involving Travel
- 51 Report of Travel Outside the United States
- 52 Travel Event Financial Report
- 53 Request for Approval of Branch Travel Event
- 53B Request for Approval of State Event Involving Travel
- 59 Travel Event Checklist
- 59A California Seller of Travel – Letter
- 59B Bus Company Operator - Letter

The SIR State Travel Committee is responsible for issuing Travel Advisories that may have effects on existing or planned SIR Travel Events.

Advisories are submitted to the SIR President for approval and are e-mailed to all Branch Travel Chairmen, Branch Secretaries and Branch E-Mail Contacts.

If you have any questions concerning information on existing Travel Advisories contact the Chairman of the State Travel Committee.

## **Branch Short Trip Information**

Branches may contract for, and use a public carrier (a bus company) for one, two or three-day trips without going through a travel agency. The carrier must possess an active “Transportation Charter Class A Certificate” issued by the California Public Utilities Commission (CPUC) and have a Commercial Automobile Liability Insurance Policy that meets the requirement of CPUC General Order 101-E (a minimum of \$5 million liability coverage).

Branches shall document these requirements on SIR Form 46 “Request for Approval of Branch Bus Trip”.

Bus companies shall furnish to the State Insurance Committee a “Certificate of Liability Insurance” that meets the requirements of CPUC General Order 101 E and names SIR as an additional insured to qualify as a SIR-Qualified Bus Company. The Certificate of Liability Insurance, under the Certificate’s Description of Operations, shall state “SIR, Inc., and all authorized Branches and members, are additional insured’s under the policy as respects General Liability and Automobile Liability coverage subject to the terms and conditions of the policy.”

Based upon an approved Certificate of Insurance, the Insurance Committee shall notify the State Travel Committee to show the approved Bus Company as a SIR-Qualified Bus Company on the SIR website.

After a company is listed on the approved list any branch may contract with an approved Carrier and document this approval on SIR Forms 46 for a specific trip planned by a branch.

The Designated Member (DM) appointed by the BEC to manage a bus trip shall be responsible for trip literature and collect fares from the participants. He shall give the participants' fares to the Branch Treasurer, who shall maintain a separate custodial sub-account in the branch financial records.

Just prior to the event, the Branch Treasurer shall prepare a check for the event payable to the bus company and give it to the DM for payment to the bus company.

Upon completion of a bus trip, the DM shall comply with the requirements of SIR Form 47 – Short Bus Trip Financial Report, detailing the disbursement of the trip's funds and distribute it per distribution indicated on the form.

## **Tipping Guidelines**

The following figures will give you a basis for tipping. Use it as a guide, but remember the actual amounts will vary depending on destinations and services rendered:

- 1 Tour bus events:
  - a. Bus driver \$ 2.00 - \$3.00 per person /day
  - b. Step on Guide \$20.00 per day or \$2.00 per person / day depending on number of passengers.
- 17 Cruise Ships:
  - a. Refer to the Cruise Line's policy regarding tips.
- 18 On cruise ships or in hotels there is no need to tip the headwaiter / maitre d' unless they provide some special service.
- 19 Baggage handling: \$2.00 per bag
- 20 Bus events: 1-day \$2.00 per person / per day to bus driver

## **Checklist**

Use the following checklist Form, as appropriate to your travel mode, when preparing for your trip. Change it to fit your needs based on your experience.

- 48 Branch Bus Trip Checklist
- 59 Travel Event Checklist