

Probus Club of Templestowe Valley Inc.

Club Affiliation No – 2219

Probus Registration No. 58457 -

Incorporation. No - A004597C

Procedures & Guidelines For Activities Leaders.

Introduction

These guidelines are a reference for Activity Leaders planning events and trips that require prior bookings and payments to organisations providing services for outings and trips. If prior bookings are required and there are limits on number of attendees, either minimum or maximum, then the events register must be used to keep track of bookings. These guidelines need not apply to events where bookings are not required and payment is made directly to the provider but the “Trips and Events Register” must be completed prior to the commencement of the event, to keep track of bookings and attendees to comply with Probus insurance purposes.

Proposing Events

When a suitable event or function in which Club groups may wish to participate is identified and bookings need to be made and/or funds need to be collected, the event will be regarded as a “major event”. If this is the case, then the organiser must notify the “Activity Coordinator” (AC) who will confirm the event dates and add them to the Club’s event documentation. When this is completed the AC will refer the information to the “Management Committee” (Committee) for consideration and approval. The required documents are available from the AC or Club Secretary.

When the AC has been advised that the Committee has approved the event, the Activity Leader can then complete a “Trips and Events Register” form for expressions of interest (available from the AC). The register has a list of members’ names and three columns to be used to keep track of members who have booked, paid and those who attended.

The columns on the Register are “B” to tick when a member wishes to book for the event, “P” to tick when the full amount has been paid after a receipt has been issued and column “A” to be used on the event day to keep track of who has attended. The Activity organiser must manage the bookings and determine when there are enough names to justify the event going ahead.

If non-members’ can be accommodated for the event, names must be added to the register with the same details mentioned above.

Meanwhile, the event will be listed in the Newsletter and on the planning boards seeking participants. When it is determined that there are sufficient numbers for the event to proceed, the Activity Leader will advise the AC and Newsletter Editor to let the members know when payment is due.

After the event, the Activity Leader should retain the completed Trips and Events Register as a record of those attending the event, and make it available to the AC if required.

In the event of an activity needing urgent approval, the “Event Activity Form” must be given to the AC on the morning of a Club meeting so the activity can be assessed and immediate approval by the Committee. This would apply to an activity occurring prior to the next monthly Club meeting.

Every activity must be approved and signed off by the AC and one other Committee member

Advanced Bookings

No advance bookings to vendors are to be confirmed unless the minimum number of bookings specified for the trip have been received and fully paid for.

Member's Priority

Once it has been decided that there are enough participating members, the final date for payment will be announced in the next Newsletter and at the following Club meeting with full payment being completed BEFORE the meeting prior to the outing or trip.

Payment in FULL will be required. Member's payments by instalments will not be accepted unless an arrangement with the Activity Leader has been made.

When payment is received for an event, the date on the receipt will be used to prioritise the event participants list, if the event is over subscribed.

Members may nominate ONE non-member partner or friend to accompany them to an event if there is a shortfall of member participants

In Summary

Events will be filled in the following priority:

Paid up members get first priority

Should the minimum number NOT be filled by members, nominated non-member partner or friend will be included with date of payment providing priority.

Should members and nominated non-member partner or friend STILL NOT fill the minimum number, additional friends may be included.

Should the minimum number STILL NOT be filled by members, nominated non-member partner or friends, the event may be advertised to other local Probus Clubs.

Note: That once non-members have paid for events, their booking is firm and cannot be cancelled under any circumstance

Activity Cancellation Due To Weather Conditions

Any outdoor activity organised for a day when the temperature is expected to be over 35 degrees C will be cancelled. Refer below for refund and rescheduling policies.

Main Event Bookings

When organising an event, Activity Leaders must ascertain from the event operator, the highest booking price per person, this is normally the charge for a minimum number of people.

For example, 30 rather than a full bus load of 45 people. The maximum price is to be the price advertised and charged to the members for the event. In the event of any excess funds for that particular booking the Treasurer will hand to the Activity Leader the breakdown of monies to be distributed to those members who attended that particular event.

The Activity Group

Sometime during the year an Activity group may run two or more events in one year. E.g. the Bush dance raised a surplus of \$200.00 in 2015. That money is to be given to the Treasurer to hold for their next event, which can be used for another approved event proposed by the Activity Leader and The Committee.

However receipts must be given to the Treasurer before the release of any money. Approval is not required by the Committee for this action.

Handling of Funds

After reconciliation of the funds, the Activity Leader should place all cheques, cash and the signed "Pay in money break down form" gathered that day, for each event in the envelope provided by the Treasurer for that purpose. It is the Activity Leader's responsibility to hand the envelope to the Treasurer.

Any Group Leaders who choose to hold any monies during the year (Not recommended) are not covered by the Probus Club Insurance Policies nor is the money covered by the Probus Club of Templestowe Valley. The Leader is therefore responsible for the money they hold.

Payment for Activities

Payments for activities can be made by cheque or cash and a receipt will be issued for the payment.

All cheques for payment for trips, theatres etc. should be made payable to: -
PROBUS CLUB OF TEMPLESTOWE VALLEY Inc.

When an Activity Leader requests a cheque as payment for an event, the Treasurer may release the money regardless of the fact that not all the cheques may have been cleared at the time.

NOTE: Activity Leaders must stress to members if they are paying by cheque they have to allow 3 days for the cheque to be cleared by the bank.

For Golf Getaways, Getaways or the Wanderers Groups. All members' cheques will need to be cleared by the bank prior to Club cheques being issued

If a cheque is dishonoured it becomes the responsibility of the member who issued the cheque to pay the bank charge and any other related charges and to make good the value of the cheque as soon as possible.

Lost Receipts

If an Activity Leader has lost their receipts, they must create an itemise list of accounts and present it to the committee. The committee will approve or not approve the payment of funds.

Member's Cancellation

A refund will not be made from Probus Club funds unless special circumstances such as death, illness or hardship have necessitated the cancellation. These exceptions must be referred to the committee in writing through the Welfare Officer from the person affected or their representative, for specific approval of a refund and if approved by the committee, the Treasurer will issue a cheque from Club funds. If an event is rescheduled and a registered participant cannot attend, their place can be offered to others and if possible monies paid will be refunded.

Event Refunds

If a member cannot attend an event, such as, Golf Getaways, Getaways or the Wanderers Groups due to special circumstances, they must notify the Activity Leader ASAP. When receiving this information the Activity Leader must contact the supplier of the event to request a refund to the member. The Activity Leader will report the outcome to the member.