

CAL ALUMNI ASSOCIATION - LECTURER HANDBOOK

INTRODUCTION

The goal of the Cal Discoveries Travel Program is to provide exciting combinations of discovery, adventure, and educationally oriented travel opportunities for a unique community drawn together by the University of California. All participants are expected to enjoy traveling as part of a group - and also to be tolerant of the occasional changes, delays, or minor mishaps that are part of any kind of travel, group or individual.

It is the policy of the Cal Alumni Association to provide attractive educational group travel opportunities in the form of well-rounded, worldwide group tour packages to attract a wide variety of alumni members and friends of Cal.

In addition to the above, the Cal Alumni Association travel program serves a variety of other purposes. It provides fellowship, education, and enjoyment for Association members, families, and friends. It offers an opportunity to share understanding and information about the University and to build alumni loyalty and support for the Association and the campus in an informal setting. It sometimes enables foreign alumni to renew past ties with the University and for alumni travelers to have personal contact with foreign residents.

It is the function of Cal Discoveries lecturers to expedite these purposes and to add value to the educational component of the trip, and to pursue the highest standards of travel efficiency, comfort, and enjoyment for travelers. The success of the program has been, and continues to be, contingent upon the quality of its lecturers and travel managers who represent Cal and the Association.

The Cal Alumni Association was organized in 1872 "to advance the interests of the University of California and to promote the welfare of its alumni." Since that date it has grown to an organization of approximately 100,000 members and has become one of the largest dues paying independent alumni associations in the world.

Traveling with Cal Discoveries Travel is a benefit of membership. The Cal Discoveries program aids in publicizing Association activities, and promotes contact among Association members, both foreign and domestic. The trips have enjoyed considerable popularity and repeat business; therefore, it's likely that many of your tour members will have traveled previously on Cal Discoveries trips.

The Cal Discoveries program is administered by the Director of Travel and staff, in partnership with tour operators. Before any program commitments are made, prospective tour operators are researched for integrity, reliability, and competence. They must also carry adequate levels of insurance to protect the Association from potential liabilities.

The travel program is planned on a calendar year basis. It is presented to the membership at the annual June Travel Reception and is advertised as a whole two times a year in multi-trip brochures and once a year in the *California* magazine. The website has the most current information about our trips. As needed, direct mail brochures for each trip are sent to select class years approximately seven to nine months prior to departure. All reservations are on a first come, first served basis.

Careful consideration is given to provide the membership with an educational travel experience. When appropriate, every effort is made to:

1. Use University faculty members and administrators as faculty lecturers and resource persons on trips
2. Include the Cal component, e.g., sites which are identified with University history, research or scholarship and use alumni contacts or groups abroad when possible

3. If there is no lecturer on the trip to have an Association travel manager or representative ensure a quality program and an enjoyable experience for all participants
4. Organize follow-up trip reunions if the majority of the group lives near by

This type of effort distinguishes the Cal Discoveries travel program from other commercially available tour offerings as it promotes affinity, enrichment, and Cal spirit. Our tours connect alumni with Cal and often give them a new type of motivation for becoming involved in Association leadership and support.

We welcome all Cal alumni and friends of the University community to join Cal Discoveries trips. Since Cal Discoveries travel is a benefit of membership, we do require that travelers be current members of the Association for the year in which they travel.

PUBLIC RELATIONS DUTIES & RESPONSIBILITIES

You have been chosen because of your academic ability and experience related to U.C Berkeley. Your role is to enhance the educational component of the trip by providing one to three 45 minute lectures with an additional 15 minute Q & A session for each, assist the tour director in routine tasks, as needed, and provide the Cal connection along the way. In addition, we hope you will evaluate the program and report back to the director at the end of the trip. We will provide each lecturer with facts about the Association, the University and enough about the current campus scene at Berkeley to address questions from tour members who may have limited knowledge. Be able to speak about the travel program in general.

You are in charge of our traveling (nylon lightweight) Cal banner for your group photo. Display it when appropriate and don't forget to bring it back to the Cal Discoveries office.

Remember, as the lecturer for the trip, you are the "Good Will Ambassador" for the Cal Alumni Association and the University of California at Berkeley. The things you do, or neglect to do, reflect directly upon the Association and the University. You are an important team leader and the value of your interaction with all trip participants cannot be overstated.

We appreciate the job you are doing and, we wish you a happy, safe, and memorable trip!

CAL DISCOVERIES LECTURER GENERAL GUIDELINES

The function of the lecturer is a "working one." The following pages should guide you and be used whenever applicable.

The lecturer sets the tone for the rest of the group! Work closely with the tour director or local guides who are the experts on local customs. Meet with and discuss your scheduled lectures with tour director as soon as possible.

Check daily with your tour director to discuss plans, problems, etc. Everyone must be prepared to travel with the tolerance of differences in customs, living standards, habits, and schedules. Remember that occasional discomfort is inevitable in travel. Some alumni approach you rather than the tour director with problems. When you do receive a complaint, be sure that it is passed along immediately to the tour director and let the person know that you are doing everything possible to correct the situation. Follow through with the tour director. Problems such as incompatible roommates and rooms that are below par, should be handled by the tour director.

Maintain high visibility. Try to arrive 10 minutes ahead of time for all scheduled events. Try to vary your eating companions so that you have a chance to visit with each tour member. The main thing is equal time for all, avoid favoritism.

Familiarize yourself with the names of all tour members and information on the trip details report. Quite often, participants are experts on topics related to your tour. Encourage these “designated experts” to speak up and contribute to the overall educational component of your trip.

Tell the tour director that Cal Discoveries Travel will send their own evaluations after the trip returns and tour operator evaluations should not be handed out on the trip.

If someone arrives at the airport, and you realize that person will not be able to keep up with the group, is wheelchair bound, etc., it is your responsibility to call the Director of Travel or the tour operator, immediately to discuss alternatives.

LOST DOCUMENTS:

If a tour member loses travel documents or is robbed, the lecturer can assist the tour director and/or help in replacing items as follows:

- a. **Passport**: Check with the tour director to see if your presence is needed. It is also helpful if the individual in question has a copy of the information page of their passport to present at the Embassy or Consulate.
- b. **Airline Tickets**: Check with tour director to ascertain whether or not that person will contact the U.S. tour operator by phone, for reissuance of the lost tickets.
- c. In the event a participant must stay behind from the group due to theft or loss of passport, etc. and good judgment warrants that the participant(s) should not remain behind alone, the tour director should make arrangements for the participant to have necessary assistance. The tour director, except in very unusual circumstances, always proceeds with the group. As a lecturer, you should be informed of all final decisions regarding participant.

Obtain a copy of the rooming list from the tour director if possible. Become familiar with the services of each hotel or ship. People will think you are an expert even though you have never been there before. Wander around to check the hotel layout.

Familiarize yourself with the list of "special" days, i.e., birthdays and anniversaries of tour members. You will find these on the trip participant details report if people have let us know. It is nice to invite the birthday/anniversary passengers to sit at your table on their special day. Make arrangements with tour director for presentation or acknowledgement of special days. Keep it simple and fun -- just a little something to recognize that person's "special" day.

Experience indicates that difficult people may appear on tours no matter what! A person who is an alcoholic, disruptive, constantly tardy, or a compulsive shopper can be disastrous if not dealt with at the onset. The best way to approach this kind of problem is to coordinate with the tour director and approach the person as a team.

Smoking Policy: Smoking is not allowed on buses, during lectures or in private dining rooms.

Photographs: Please attempt to get a group picture somewhere as soon as possible. You will have to plan ahead for this and the tour director can help suggest a good place for the picture. It is fun to have a good group picture.

Social Media: Please arrange early in the trip to email a picture from the trip to our Cal Discoveries inbox (caldiscoveries@alumni.berkeley.edu) so we can put it “live” on our Facebook page during the trip. This is how we get the most interest in our site. Travel pictures are compelling and beautiful. The pictures can be

scenic or a group picture. If you are planning to post pictures of individuals, make sure you ask them if it is okay with them before sending the picture to us.

Advise group members that they will be put on the Past Travelers List to receive advance notice of trips. They are also invited to the annual Travel Reception always held the first Sunday in June at the Alumni House.

As we strive to market trips online, it is increasingly important and necessary for us to collect e-mail addresses. Our lecturers are asked to circulate the e-mail address list provided by the office staff. This list should be double-checked for legibility and returned to the office after completing the trip. It is important to return the list instead of simply providing email addresses because the travelers are giving permission to be added to lists. Before returning the list, make a copy of it so you can send a welcome home email to the group with the email addresses of everyone who gave permission to their address with the group.

The organization of a post-trip reunion is the responsibility of the lecturer. Bring it up at the last scheduled time the whole group is together. Select a site -- traveler's home, your home, Claremont Hotel, restaurant, etc. Poll the group for best date, time, and type of gathering (potluck, catered, etc.). The cost of a trip reunion is the responsibility of the participants. Experience dictates that a reunion should be scheduled within 3 to 6 months of return date.

When you get back, please call the Cal Discoveries Office: 510.900.8222 the next business day to "report in" on your trip so that evaluations can be sent out in a timely manner.

Within 2 weeks after the tour is completed, submit a full written tour report to the travel office. (Items to be included are noted on page 6 and 7.) Keeping a daily journal or notes is important.

EMERGENCY MEDICAL PROCEDURES IN CASE OF SERIOUS ACCIDENTS/ILLNESS OR DEATH

In light of our new risk management policies it is imperative that you understand your role in case of emergencies. The question you should ask yourself if you find you are faced with a medical emergency or death is "What would a reasonably prudent person do?"

Remember, your tour director is a professional who is aware of all services available and will normally handle emergency problems, but your presence provides extra assurance of protection and service for Cal travelers.

A. PROCEDURE IN CASE OF MAJOR ACCIDENT OR ILLNESS:

1. If a trip to the hospital is necessary, coordinate your role with the tour director. If you are required to accompany the affected tour member or assign a competent individual to do so, assist traveler to secure necessary documents, e.g. passport, visas, air tickets, etc. Never release these documents to a stranger, ambulance driver, etc.
2. Contact Cal Discoveries office as soon as possible so that family members may be notified to begin planning as required.

B. PROCEDURE IN CASE A PARTICIPANT MUST STAY AFTER THE GROUP DEPARTS

1. In the event a participant must stay behind from the group due to illness, theft or loss of passport, etc. and good judgment warrants that the participant(s) should not remain behind alone, the tour director will make the arrangements and you should follow their suggestions. The tour director, except in very unusual circumstances, always proceeds

with the group. The final decision in these situations is made by tour leadership consensus.

2. In the event the person remaining with a sick participant, must stay beyond the final day of the tour, and is over 65 years old, their own travel insurance coverage must be taken into consideration. If they have purchased Travel Insurance especially for this trip, coverage may be extended by calling Travel Insurance Services. The contact information should be in the participant's travel insurance information.

C. PROCEDURE IN CASE OF DEATH:

Perhaps the toughest problem to handle on any tour is the death of a tour member. Such a sad happening taxes the abilities of the lecturer who becomes the communicator between the tour director and the tour members. The legal details are taken care of by the tour director, but the rapport among the tour members is the responsibility of the lecturer. In many cases, a physician traveling on the tour can be of great help.

1. If death occurs:

- a) Make certain the spouse or traveling companion is not left unattended.
- b) Notify authorities: Verify that your tour director has called the United States Embassy or Consulate and has made tentative arrangements for body, pending word from next of kin. The Embassy or Consulate will advise as to how to deal with authorities. Verify that the tour director has notified police and hotel/cruise administrator.
 - 1) Your tour director will know what specific requirements must be met to prepare the remains for transport back to the U.S. Air carriers and other transportation methods have varying embalming, casket, cremation, etc. requirements.
 - 2) If local laws require an autopsy, ask your tour director to ask the funeral director to forward a copy of the autopsy report along with all the other final travel documents.
 - 3) If death occurs in a non-English speaking country, ask your tour director for assistance in securing a **certified** copy of the Death Certificate in English. If possible, obtain extra-certified Death Certificate copies in whatever language as they will be important for settling the estate. Once travel companions have returned to the U.S., it will be difficult to obtain these documents.
- c) Make sure your tour director calls the tour operator with details. Advise the tour operator to relay such a message to the CAA Cal Discoveries office: 510.642.3717 and arrange for Emergency Contact person to be notified.

The names of next of kin and/or Emergency Contacts and their telephone numbers are on all Trip Details Report. These forms are to be carried at all times by the tour director and the CAA lecturer. The tour operator and Cal Discoveries office also have copies of all Personal Information Forms on file.

- d) Inventory possessions: purse, wallet, luggage, clothing pockets, jewelry, passport, etc. with mortician, or if taken to hospital, administrator. This should be done by

two persons as witnesses to each other. Pack effects and make arrangements for their return to U.S.

- e) Ask for a copy of the full report from the tour director for the Cal Discoveries office. Upon completion of the tour, give the report to the Director, who will forward the information to the tour operator. Also, please provide a summary of the actions you took in the situation.
- g) In this situation, your biggest job is to provide assistance where needed. Always defer to the tour director.

BRIEFING ON WALKING DIFFICULTY ON ALL SIGHTSEEING EXCURSIONS

Be sure that the tour director or local guide makes special mention about the required walking for each tour -- the length of walking, the degree of difficulty, or special concerns that might affect some individual travelers. Do not let people with walking difficulties interfere with the tour's pace, efficiency or enjoyment.

On buses, make certain that the local guide or tour director AGAIN calls attention to any such matters and advises that persons not wishing to go on any segment of the tour may wait on the bus.

SAFETY QUESTIONS

If at any time, questions regarding safety arise, it is within your responsibilities to point out these concerns to the tour director, bus driver, local guides and/or participants as needed. Should such a problem become critical please call the Cal Discoveries office or U.S. tour operator for the trip. (Refer to the trip participant details list for personal phone numbers of Cal Discoveries Travel staff and Emergency Contact information given to you by the tour operator in your final documents.)

THE LECTURER OR REPRESENTATIVE REPORT

1. Due within two weeks of your return, please include your overall impression of the following:
 - Pre-Departure Preparation: Were you adequately briefed to be a good lecturer? What bases were not covered that should have been?
 - Air Flight Arrangements: What could have been improved upon? Did check-ins proceed smoothly? Were the lay-overs justified?
 - Itinerary: Did it "flow" smoothly? Was it interesting, educational, worthwhile? Was the pace good? Was tour scheduling/routing well planned? Was there sufficient free time?
 - Agency's Performance: How was the customer service? Was everything as advertised? Were the tour participants satisfied? Were questions answered efficiently?
 - Local Guides' and Ground Operators' Performances: Were they competent? Prompt? Was their English good? Were the buses and PA systems good?
 - Trip Logistics: Airport transfers, accommodations, excursions, restaurants and food, services.

- The Educational Component: Information and knowledge offered by lecturers, guides, tour managers/directors, handouts, reading lists, etc.
 - Tour Director's and/or Faculty Lecturer's Performance: Ability to arrange, implement, adjust trip logistics, country/subject knowledge, communication/group dynamic skills, ability to adjust trip to group needs, environmental/cultural sensitivity, personality and disposition. Did the tour operator provide headsets/listening systems?
 - Cal Discoveries Office: Did we meet expectations? What more could we have done for better customer service? For you? For the participants?
 - Regarding Individuals: Any disabilities, specific complaints, problems? Any specifics regarding individual travelers which will allow us to provide a better trip next time should be noted. This may be submitted separately from Travel Host Report and in confidence to the Cal Discoveries office.
 - Was the trip a good dollar value?
 - If this was a cruise, evaluate the ship: How would you rate the ship overall: the cabins, service, quality of food, dining room, Captain and officers, shore excursions, zodiac landings, etc.?
 - Constructive Criticism:
 - a. What can the tour operator and CAA do to improve performance and satisfaction for future trips?
 - b. What suggestions do you have for other lecturers?
 - Overall successes: High points
 - Overall problems: Low points
3. Trip Reunion Plans: What has been planned for your trip reunion? When? Where?
 4. Host & Expense Report
Submit Host Report and Expense Report within three weeks after the trip returns to Cal Discoveries, c/o CAA, 1 Alumni House, Berkeley, CA 94720-7520. When applicable, please attach your itemized expenses with receipts to your report. You may expect reimbursement approximately 2 weeks after submitting your expense report. Expenses cannot be reimbursed more than two months after the trip returns unless approved by the director.
 5. Finally, have the Cal banner, all leftover supplies, and e-mail address list been returned to the office?

MEDICAL REPORT FORM

(To be completed by Tour Host accompanying traveler)

Traveler's Name _____ **Trip** _____ **Date of
Illness/Injury:** _____

Please document the particulars of this major/minor accident or medical emergency and give to the Director of the Cal Discoveries Travel program upon your return.

1. Traveling alone? If not, with whom? Spouse? Other?
2. Nature of problem:
3. Was person willing to seek medical attention? Or, was medical help refused and why?
4. Location of accident, time of day, weather conditions (if pertinent):
5. Cause of accident or illness as you understand it. If illness, is condition a pre-existing one? Was this noted on their personal information form?
6. Names and addresses of witnesses (if pertinent):
7. Name of place and phone number where medical treatment was administered:
8. What treatment was rendered?
9. Did person return to hotel? At what time? Or, did person return to U.S.? When?
10. What portions of the trip were missed due to condition?
11. Was medical insurance carrier notified?
12. Was traveler's personal physician contacted?
13. Host's impressions of the person's overall condition and attitude:

Lecturer's signature: _____ Date: _____