

## BRITISH ASSOCIATION OF FRIENDS OF MUSEUMS

# Organising Friends Visits

## *General*

Trips can be an excellent feature of a Friends' group programme. They should always show a profit. Usually a member of the committee takes on this responsibility. They will require various skills: attention to detail in the planning; an ability to get on with the participants on the trip itself; and being able to anticipate possible problems. Access to office facilities with a computer for word processing, copying etc, and e-mail is essential in corresponding with all involved in the preparations. Responsibilities of the organiser: Dealing with the planning, negotiating with organisations, companies, hotels and with members' queries concerning finance and insurance are all part of the process.



At the start of the trip itself, make newcomers welcome and effect introductions; ensure that the driver knows what is expected. You may need to act as navigator when required, sitting at the front of the coach. Throughout the trip the organiser will have to check and count passengers, or delegate this to the driver or another volunteer. A supply of duplicate copies of lists of passengers will come in useful. You will have to deal with latecomers who sometimes need to be pacified - or mildly reprimanded! Do not underestimate how long it takes to get a larger group off the coach and back on with all safely seated before the driver can set off.

Accidents can happen and the unforeseen must be anticipated. If you do not set an age limit there can be occasions when a member will feel unable to keep up with the group and should be gently encouraged to drop out for the benefit of the majority. A clause in the brochure should clearly state if there will be a lot of standing around, walking, many steps, cobbled streets and that some of the visits will be strenuous and so on which will act as a gentle warning.

# BAfM

## *Choosing the destination*

The destination should be relevant to the interests of the Friends membership or the parent museum and provide an interesting event at an acceptable price. There could be an element of visiting places not usually accessible to the public. This can be achieved by contacts with curators, keepers, owners and any personal contacts. The opposite number at the Friends of a museum or gallery at the proposed destination might be able to help - you can always offer a reciprocal visit. However, acceptance of hospitality by the local Friends group could mean getting drawn into a kindly but time consuming reception when your group really wants to look at the museum.

The offer of a newly opened or newsworthy venue or a special exhibition can be an enticement. Being taken door to door with everything pre-arranged is a great attraction particularly for the less mobile member. If the destination is at some distance from base, the journey time might be calculated so as to arrive at opening time. Visit the more distant venue in the morning after a prompt departure from the hotel.

The organiser can send out an early flyer setting out an outline of the visit asking for those definitely interested to complete a tear-off slip with name, address, phone and e mail. The full information can follow to those who have shown interest. Or send a list to the wholesale travel company who then do all the rest returning an agreed profit to the Friends who therefore take no financial risk.

## *Dates for visit*

Where possible, find out the museum programme for the date of the proposed visit to avoid arriving when a show has just closed or is being put up. Local circumstances should be taken into account. Some cities host major sporting events, conferences or trade shows where every hotel room in the town is pre-booked or at a premium. Avoid school holidays and check with other groups in your town to avoid clashes and possible duplications.

A three night visit might run from Thursday to Sunday with a four night visit setting off on Wednesday. The longer visit would help when a lengthy journey is involved or a particularly interesting destination merits a whole day. Holidays abroad could stretch to a week or more if there is sufficient interest at the higher cost incurred.

## *Travel*

Build up a good relationship with a local coach company having established their reputation and value for money. For longer journeys you might ask for an executive coach with beverage facility and toilet. Some specialist wholesale travel companies will be prepared to use your local firm but they may prefer to work in conjunction with their own preferred contacts for transport and accommodation etc.

Depending on your own location, foreign travel might use ferries or Euroshuttle as flight arrangements are more difficult to arrange and coaches would still be required to take members to the airport and for the return home, where there may be flight delays. A coach may be essential for getting around at the destination.

All journeys can run into delays en route: major travel on a Friday should be avoided completely. The driver is required by law to take a break at regular intervals so plan your own breaks and comfort stops accordingly. Coach travel is usually calculated at an average of 40 miles an hour.

### *The hotel*

The choice and location of the hotel should be an attraction in itself. Look at various web sites for details of facilities and proximity to your choice of attractions. A quiet hotel may be a relief after a busy day. A city hotel may not be competitive at certain times of the year. You will be able to find out more about possible hotels and attractions on Tripadvisor but some reports should be treated with caution.

On arrival at the hotel the organiser should ask passengers to wait in the coach while you check that the rooming list has been used by the hotel to pre-allocate rooms. This will require the preparation of a list with double, twin or single preferences, dietary and other requirements. Some hotels ask for the list in advance and ideally all is ready on arrival. It can help the hotel to phone from the coach about an hour before arrival. Some hotels will send someone on to the coach to explain arrangements.

Do not assume that portage will be available without an extra charge; coaches cannot always park outside the hotel so suitcases with wheels should be recommended.

### *Working out the cost*

Once a destination is agreed the visit can be organised in-house or specialist wholesale travel companies can be invited to quote for a package costing. This is essential for a foreign trip where contacts are difficult and rates of exchange can fluctuate quite apart from legal aspects of Travel Industry Package Holiday legislation. There are several excellent specialists including many of the well-known travel firms whose access to deals can help mitigate their profit element. But even with the help of such firms there will still be a lot that the group organiser has to do at the planning stage as well as during the trip. You may not want to accept a standard package which does not feature aspects relevant to your group. The firm should be prepared to work with you on the detail.



However, the organiser may not want too much responsibility and in this case the travel company can provide, at an extra cost, a courier or leader to accompany the group or in the case of a foreign trip meet the group on arrival. Try to ensure that the guide is an expert in your group's interests, perhaps an art historian, as a guide lecturer. In a foreign country someone who speaks the language could prove to be invaluable.

Especially when not using a travel company, for a destination with which the organiser is not familiar,

the cost of a preview visit to make contacts, check venues, arrange talks, meals, parking etc. may be crucial. The cost of this recce should be included in the proposed selling price.

### *Expenses*

It is often agreed by the committee that the group organiser or leader takes the free place\* on the trip. This can be taken to balance out the majority of personal out of pocket expenses: post, phone, e-mail involved in setting up a visit rather than keeping minute records. Others may feel that they would rather seek reimbursement for all expenses and pay their way. If this is the case an allowance for these set-up and administrative costs is included in the costings. The aim is to show a useful profit for the Friends as well as provide an interesting event.

\* Some wholesale group travel companies offer one free place for, say, 30 paying passengers. Others may offer more free places on achieving further totals - it is all calculated in the selling price. The value of subsequent free places could be taken as part of the profit for the Friends.

### *A specimen costing*

A viable number for the group could be a minimum of 30 people plus the leader and driver. A wholesale travel company would include the leader's free place and the driver in their costs. If doing the trip 'in house' these must be allowed for. This specimen costing is for 30 plus leader and driver.

Coach	67.50 @ 30 places **
Hotel	151 (2 x DB&B + 2 x B&B + 2 x wine)
Entrances	39.50 (5 visits)
Leader cost	7.00 (@1/30 <sup>th</sup> )
Driver cost	5.00 (1/30 <sup>th</sup> of hotel, but hotel room may be offered free)
Tip for driver	2.00
Contingency	5.00
Donation	10.00
TOTAL	287.00 Was sold at £295.00

*Single supplement £20.00*

\*\*Number of places sold 40 so we made a total profit of around £1200 as coach, leader and driver costs, contingency and profit were all covered in the first 30 - a welcome bonus.

Single room supplement to be added as quoted or can be reduced to make it less inhibiting by adding a proportion to the doubles. Accommodation might work out as around 10 doubles and 10 singles but more popular destinations could greatly exceeded these numbers.

This sample budget covers the hypothetical costs with the leader's basic cost of travel and room divided by 30 but it might be agreed that all the other costs such as meals are included for the leader which would increase the £8 proportionally.

If you arrange transport and hotel yourself then the cost of the coach is divided by 30 eg £1,500 = £50 a head. You have to provide driver's accommodation as well as that for the leader so add the cost of two rooms by 30 - with single supplements as appropriate (the leader may share with a partner avoiding the supplement). Thus the leader's and driver's costs are shared by the paying members.

If the visit proves popular and more than the 30 places are sold then the Friends will make an extra profit as all members will be paying a sum based on the calculation for 30. In the example above to sell 40 places would see a total surplus of over £1200. However a group of over 40 may be unmanageable and on an intensive holiday in a foreign country 20 might be a sensible maximum calculated accordingly. The number is dictated by the coach capacity and hotel room availability or some other limitation. The extra 'profit' might be held as a contingency sum and used to cover an extra such as a drinks reception before dinner. Some groups state in their leaflet that any surplus raised will be given to Friends funds.

### *Getting a quotation*

The quotation from the wholesale travel firm can include whatever you ask for. Be aware that these travel companies may offer tourist attractions that may not appeal to your more knowledgeable members. It is simple these days to check the proposed venues on the internet to get an idea of what to expect - some websites will have a link to their own Friends groups. The National Trust and English Heritage have separate departments and special literature for group organisers with information on parking, recommended length of visit and so on.

It is sociable to include the first and possibly the final evening's meal in the hotel, or to make the entire stay on a dinner, bed and breakfast basis. This seems popular as members are usually tired on arrival and it acts as an icebreaker. Be generous with wine as a good atmosphere is created - two glasses or half a bottle each, but this may seem unfair on those who are teetotal! The hotel can be asked to quote for the meals separately (ask to see specimen menus) or on the basis of one or two night's dinner, bed and breakfast and the other nights B&B only. It can be cheaper to get an all-inclusive half board rate from the hotel but you need to be sure that there is a reasonable standard of food. This may be preferred by some members or single travellers and saves the worry of finding a place to eat. It does of course increase the selling price of the trip.

If the destination is out of town there may be no alternative to dining in the hotel but staying in an interesting town offers the opportunity for members to be adventurous. Depending on the destination the final evening together could perhaps be at a



convenient or interesting restaurant rather than at the hotel.

**Currency fluctuations:** if going abroad the travel firm must allow a contingency for currency fluctuation so as to hold to the advertised price.

**Entrance charges:** as a majority of Friends are also members of the National Trust, if an NT property is to be visited, the cost could be excluded and a note sent out to the effect that non-NT members must pay admission on arrival. Members must remember to bring their cards with them. Some may also be members of English Heritage or the Royal Horticultural Society. It can usually be assumed that all members will be entitled to a senior concession. You may have to collect any admission charges to pay in a lump sum at the gate to obtain any non-member group concession.

**Gratuities:** including an amount per head as a gratuity for the driver saves going round the coach with a hat at the end of the trip and the possibility of people being ungenerous or having no change. If you feel that a gratuity is appropriate for the banqueting manager or others that needs to be added in to the budget or taken out of the contingency.

**Extras:** an optional extra can be offered such as a theatre or concert visit. If programme details are not available at the time of sending out the original information, you can include the extra offer with the confirmation of booking. This is not sent out until a few weeks before confirming your own bookings with the travel company or hotel.

**Deposit:** if using a travel company they will specify the amount of deposit required. It should be a reasonable sum and should be due around six weeks after the notice goes out - the notice will usually be timed to go out with a Friends' newsletter. If a separate mailing is required the cost would come out of the profit/contingency. The date for the balance will again be stated or should be no less than six weeks before the date of departure.

### *Insurance*

All participants must be requested to produce details of their own policy or must take out insurance themselves. Alternatively you could consider setting up your own scheme with specialists such as Towergate Chapman Stevens. Members must have insurance for foreign visits - and of course a passport valid beyond the date of travel.

The terms of insurance must be set out clearly in your leaflet and any claims must be dealt with by the members themselves. A simple change of mind is not an insurable matter but if no lists have yet been sent off to the travel company or if a substitute member can be found a refund of all or part may be possible.

If your group has taken up BAFM's optional insurance cover you still need to be sure that you understand what is covered and what is not. The coach company will have its own cover but if a member falls getting on or off the coach who is to blame? If they trip over going round a venue who is to blame? Public Liability Insurance is full of grey areas not made any easier by the proliferation of no win-no fee solicitors. Some Friends groups clearly state in their literature that they have no responsibility for accidents.

## *Payments*

It can reduce the burden if a separate committee member is prepared to receive deposits etc. and draw up lists of participants. Cheques may be made payable to the Friends but the travel firm may ask for them to be payable to themselves. Either way it is helpful if cheques are routed through a committee member who can ensure the sum is correct and can keep a list of who has paid and who needs chasing up - this gives a more personal touch. Travel legislation requires that money collected is held separately until after the visit in case of claims.

Some travel companies will take on all administration, not always at an extra cost and receive money direct returning an agreed 'profit' to the Friends after the end of the trip.



## *Publicity*

Illustrations of destinations can be downloaded from their website to make your leaflet as attractive as possible. A poster version can be produced for the Friends notice board. Some wholesale travel firms will provide leaflets with suitable text. They may offer only a certain quantity free with a charge for any extras should you want to send a leaflet to every member. Alternatively your own flyer can be produced inviting members to write in for the full details.

## *Setting up the trip in detail*

Tourist Information Centres (TIC) are usually very helpful and might make some of the arrangements for you. If arranging the trip in-house, hotel conference or group bookings departments will negotiate special rates. You can often strike a bargain possibly getting a free room for the leader or the driver as a bonus. Letters, e-mails or phone calls to the various galleries and museums must be confirmed and in some cases forms have to be completed with deposits or full payment in advance. The use of a Credit Card particularly with foreign currency transactions may be helpful.

Near the date further contacts should be made to ensure the smooth running of the trip. If a travel company is used they will make the visit bookings and in some cases will have the venues invoice them direct or near departure date will send the leader a set of vouchers or envelopes with the appropriate sums in local currency to be handed over at the destinations.

Notes and literature for members: Tourist Information Centres and various destinations can be asked to provide bulk leaflets, usually one per room. Some tour companies will produce a supply of itineraries for each member including timings and notes. You may wish to draft your own detailed notes over the period before the visit and these could include housekeeping information and some hints for the free time part of the trip perhaps with suggested restaurants for free evenings. A vast amount of information is available on the internet.

## *The journey*

The coach driver is legally obliged to take a break after a certain time and will suggest destinations for coffee and comfort stops. A lunch break may be made at an appropriate destination eg a National Trust property or interesting town but remember that the time allowed must relate to the eventual time of arrival at the destination. It is vital to ensure that everyone knows the time they are required back on the coach en route as well as during the visit itself. Repeat any information at least twice!

## *Emergencies*

There may be last minute cancellations due to a range of reasons and the member will in some cases forfeit their full payment. During the visit a member may not be on time delaying the programme. Someone may have an accident or take ill which in a foreign country can create language and other problems. It is impossible to anticipate everything so it would be helpful to have a committee member available to take charge if the leader has to take a member to hospital or wait for a straggler.

A formal risk assessment document might be drawn up setting out the hazards, risks and action required. The leader having a mobile phone is a great help; giving this or the number of the driver's phone to all participants can help in the event of any problem eg during free time.

Day trips: much of the above will apply to the organisation of a day trip. The costings will include coach, admissions, talks, meal if included, which can save a deal of time particularly in a busy venue, gratuity to driver, contingency and profit.

## *After the visit*

You could devise a feed back form for (anonymous?) comments on the trip and aspects of the arrangements. An occasional questionnaire in the Friends newsletter might seek ideas for future visits.

Letters of thanks where appropriate should be sent to those who gave services. A financial reconciliation will be carried out in conjunction with the Treasurer.

## *Conclusion*

All the above is a personal view, based on setting up and leading over thirty visits and holidays at home and abroad for my local Friends group. Do not be put off - visits can be most enjoyable for the organiser, with a great sense of achievement in taking fellow members to places they may not know about. And a very useful surplus for the Friends' coffers can be achieved with careful costing.

**Alan Swerdlow**

3.6.2010 revised 12.2016