

Senate	
Staff	
ManCom	08/09/08
ExCo	14/08/08
Board	

# *Uplands College*



## **Policy Document**

### **CULTURAL AND SPORTING TOURS**

1 September 2008

#### **Preamble**

As part of its educational mission and in order to encourage a broadminded, enquiring, and informed approach in its learners and staff, Uplands College supports school tours and travel in principle.

The College will endeavour to encourage, facilitate and arrange a diverse programme of such activities in order to offer the maximum opportunity for growth, development and education in as many of its learners as possible.

If properly selected and managed, tours can contribute greatly to the ethos of the College. These tours may be organised by the school, individual staff members, parents or others; The efforts of those willing to get involved are appreciated.

Tours can be costly, both in time and money, and because all tours emanating from the school, or involving, in the main, our scholars, are automatically associated with the school, certain rules, to protect all our interests, are necessary.

There are various designations of tours falling into either local or international categories, and the organizing responsibilities currently reside within the respective College sport or cultural staff.

During a child's 5 years at the College the school will endeavour to provide at least two opportunities for a local tour or festival and one opportunity for an international tour.

#### **Overview & Objectives**

Based on the experience from recent tours, it is evident that there is a need to establish some guiding principles to assist stakeholders (College, Staff and Parents) with the organization and funding of overseas tours in particular and also as to ensure that the existence of such an important experience is not jeopardized in the future. A secondary objective is to create and maintain a knowledge base, which is available to the stakeholders in the future, by producing a tour document with guidelines to ensure processes are put in place so as to achieve maximum benefit at minimum cost. A third objective is to reduce the time and associated cost that staff members expended on organizing tours and to make the experience pleasurable for all the stakeholders.

#### **Tour Categories**

The College has divided international tours into three different categories.

### Category A – Sporting & Cultural Tours

For example Rugby, Cricket, Hockey, Netball and Choir. These tours require a selection process, and the College would therefore like to take the strongest team possible. Parents are thus informed of the tours well in advance, in order to allow parents to plan accordingly. If a child is selected for a category A tour, they will be expected to attend.

### Category B – Educational Tours

For Example Art & History, and Economic Management Studies. These tours are strictly voluntary tours, and are demand driven, should there be sufficient numbers.

### Category C – Extension Tours

For example Red Sea diving, Wildlife Club to Okavango, Kilimanjaro, etc. These tours are strictly voluntary tours, and are demand driven, should there be sufficient members.

### Local Tours

In the first instance the College encourages participation in as many national tours and festivals as possible. More scholars and staff members are able to participate in these and they are relatively cost effective. Foreign based tours will only be considered once all local options have been comprehensively taken advantage of. It is unlikely that an overseas tour will be considered for a sports code unless the group has proved its worth in at least one local tour or festival.

The policy deals mainly with procedures for overseas tours however the principles and procedures are equally applicable to local tours.

### Selection for Sporting Tours

The cost of tours has escalated dramatically in the past few years as a result of uncontrollable external factors such as exchange rate, airfares and taxes. The possibility of parents not accepting an invitation to tour because of cost, effort and alternative choices becomes a reality with the negative effect of weakening the touring side and even jeopardizing the entire event. The College adopts a merit based selection policy in selecting the teams and parents may choose to be a part of the tour or decline the invitation. There is no formal commitment from parents, other than a moral obligation, which does have some downside risk, particularly in the case of late withdrawals for any number of reasons. It is therefore advisable for pupils to be included as non touring reserves.

### Motivation of Tour

- All tours are must be conducted with reference to this policy and must be discussed in detail with the Co-Curricular Coordinator at inception.
- Motivation for an overseas tour must include the following points:
  - Justification (Why now, why at all)
  - Skill level of the pupils. We certainly do not expect the pupils to win all their games but they should not embarrass themselves or the College. The motivation should included a plan to ensure team readiness in the months leading up to the tour
  - Financial Implications. We need to have some idea of costs and the ability of the parents of the pupils to afford the trip. The anticipated team members should be checked confidentially with the finance office. The Business Manager must have seen a first pass of the budget before the proposal is submitted to ManCom and ExCo.
  - Fundraising / Sponsorship Proposal. No fundraising may take place unless it has been approved by the Headmaster.
  - Suggested dates and destinations. The proposal must be made bearing in mind the academic timetable and other sporting commitments of the College.

- Size and Organization. How big is the squad? What are your selection criteria? Are you using a tour operator? How many staff members will be going? etc.

When deciding on which tours are to be approved, the key decision points will be:

- The strength of the side
- When last that particular sports code toured
- The relative importance of the sports code in the College
- The number of pupils being given an opportunity to travel
- The part the tour plays in the strategic development of the sports code
- The equity of allowing a particular code to tour in one year (e.g. Rugby) if it will possibly prevent another tour in subsequent years (e.g. Cricket, because it is the same boys).

### **Provisional Tours by Year**

2005	Girls Hockey; UK
2006	Rugby; S America; Europe, Kilimanjaro
2007	Netball; Malaysia; Boys Hockey; UK,
2008	Europe, China
2009	Rugby S America, Girls Hockey, Tennis UK
2010	No tours
2011	Boys Hockey
2012	Cricket
2013	

### **Overseas Tours Guiding Principles**

Overseas tours remain on the compendium of learning experiences offered by the College and will continue to be scheduled and run under the College's banner. An attempt to assist in the organisation and management of tours is submitted under the guise of "Guiding Principles" below:

#### **Starting the Process**

Based on, but not confined to, a rotating system, the College management will expect the particular activity to submit its intention, through the teacher in charge of that activity and the 1st Team coach (if a sporting activity) to tour at least 12 months in advance of the planned tour date. Tour Operator/s will be required to provide a number of detailed quotations based on location, itinerary, period away, cost (even if approximate) and possible tour squad. Provisional approval by the College management is required before the process can continue and the management reserves the right to reject a tour proposal. If a tour is approved the College management will ratify the selection of a Manager and a Coach for the tour.

#### **Defining the Tour - Itinerary, Costs, Number, & Final Approval**

With the provisional approval of the College management, the Manager and Coach can invite parents to become involved through a meeting to launch the tour. The tour itinerary accepted by the management will be put to the meeting. A vote will be taken at this meeting to decide on whether the tour should proceed, giving due consideration to individual and/or group affordability constraints.

The meeting will elect a planning subcommittee to assist the staff in the early planning of the tour. Based on the College's policy of merit based selection, the tour management should compile a provisional budget as soon as possible, taking into account the size of the proposed tour party and the need to include development players in the overall costing. Central to this budget will be the consideration of at least two quotations from different Tour Operators.

Once sufficient details have become available, the tour committee will submit a formal proposal to proceed with the tour to the College Executive. This proposal will include the favoured quotation and tour budget and make reference as to how the tour costs of 'development' players are to be covered by the tour committee. No commitments to travel companies or tour operators can be made until this request has been submitted and a formal response provided.

The travel agent shall be responsible for the itinerary, travel, transport and accommodation arrangements (and payment thereof) as a minimum. The tour committee is responsible for topping up the remaining needs such as passports, visa's, travel insurance, kit, pocket money, site-seeing in free time, gifts etc.

### **Fundraising and Sponsorship**

Parents must understand that the overwhelming cost of a tour will be borne by the parents. Limited fundraising can take place for category A tours. It must be clear whether funds being raised are for an individual or to bring down the average cost of the tour for the entire squad. 70% of the general funds raised should be applied to bringing down the average price. The remaining 30% should be placed in a tour bursary fund. The bursary fund should be administered by the tour committee, which should include at least one parent.

Touring groups may get items sponsored, but the sponsorship must conform to College regulations governing sponsorship. In other words the colour of sponsored items logos etc must be approved by ManCom.

### **Tours Procedure**

The first step is to discuss the concept of the trip with the Headmaster. Then: Once the idea has received the "in principle" approval of the school, follow the procedures below.

- An "in principle" proposal must be drafted for ManCom and ExCo.
- A list of potential team members must be submitted to the accounts department for approval. This needs to be handled discreetly. A student who is in arrears with school fees may not go on a tour.
- All tour related income must have been received by the college **prior** to the amounts being paid to the tour operator with the final payment being received no later than 8 week prior to departure.
- Parents of potential team members must be contacted by letter, using the pro-forma "expression of interest" letter, which covers all the organisational and legal aspects.
- All letters to parents must be countersigned by the HM, and should be sent well in advance.
- If there is sufficient interest, the tour **proposal** can be finalized.
- The final budget must be approved by the finance department
- The final proposal must be approved by the Headmaster
- The finalized tour proposal must be presented to a general meeting of potential parents to confirm their level of commitment
- Provisional team selection can then take place and deposits called for.
- Approved fund-raising can commence.

### **Financial Matters**

Overseas tours are particularly expensive and must be planned with great care. The cost of an overseas tour is roughly equivalent to 75% of one year's tuition fees. Add to this the cost of two or three local tours and parents can expect to budget the equivalent of one year's tuition fees over a five year period.

Extra careful planning needs to be exercised in cases where a child may go on more than one tour during their duration at the College.

- Tours must be fully self funding, including staff expenses and transport to and from the airport.
- A budget planner is available from the finance department. It will help to establish a correct cost per pupil. Please discuss it with the Business Manager if you need assistance.
- The Accounts Department must receive a copy of the letters to parents and the budget as soon as possible. This will act as official communication to that the tour is taking place.
- Refunds will only be considered if there is a significant amount left over at the end of the tour.
- All tour members must have valid medical aid cards. Pupils going on an overseas tour must have medical insurance as specified by the tour operator.
- An advance can be made to tour leader's credit card for medical emergencies.
- All sponsors must pay school directly at the time of agreeing the sponsorship. They can either pay a lump sum or the amount for a specific item. A donation certificate will be issued when payment is received. School suppliers may not be paid directly by sponsors. Should a sponsor wish to provide a specific item (e.g. Tog bag) they should generate the order and pay the supplier directly, but then they will not be issued with an Uplands tax certificate.
- Accounts department are to receive a copy of all letters relating to tour, so that they are aware of all amounts to be paid, and when. This will also help them to keep a watch for parents whose financial circumstances have changed subsequent to initial approval.
- In the unlikely event of cash being received by teachers, it must be banked with the accounts department immediately. **Under no circumstances may teachers pay for expenses from cash collected from students.**
- The charge for the excursion will be debited to the student's account and payments received will be credited to the account. These charges must be handed to the accounts office prior to month end processing.
- All tour amounts, including deposits, must have been received by the College prior to being paid over to the tour operators.
- A cash advance may be drawn by the team manager prior to departure or the amount for incidental cash expenses may be paid into their credit card. Either way, a complete and comprehensive reconciliation, including all supporting documents, must be done by the staff member within 2 weeks of their return.

### **Guidelines For Planning An Overseas Tour**

#### **Information the operator will require in order to put a quote together for you:**

- Nature of the tour (sporting, cultural etc).
- Destination.
- Time of year to travel and preferred length of tour.
- Number of learners and staff.
- Do you have a budget to work to?
- Would you like staff to be built into the cost as free places?
- General age range of children who will be travelling.
- Travel insurance must be included.

#### **For sporting tours:**

- Number of fixtures required.
- Level of team and strength.
- Particular schools to host and play against?
- Preference of hosting over hotel accommodation?

#### **For Educational / Cultural tours:**

- Focus of the tour (Art, Drama, General Interest etc).
- Preferred cities to visit?
- Any specific sightseeing entrance fees to include?
- Any other special requirements?

**Important factors to consider:**

- Everyone travelling must be in possession of a valid passport (valid for a minimum of 6 months from the date of return to South Africa).
- It is wise to get a list of nationalities to ascertain whether anyone would require a visa or not (Uplands has a wide variety of nationalities attending the College. The Visa requirements may change from country to country).
- Get copies of the passports.

**You will also need to gather the following information from the learners during the organisational stage:**

- Full names and dates of birth of all travellers.
- Dietary requirements.
- Allergies.
- Rooming lists.

**General payment structure:**

- Deposit – between of around 20% per person depending on the cost of the tour. This is a non-refundable deposit and would be asked for on confirmation of the tour. This will be used to secure airfare and land arrangements.
- 2<sup>nd</sup> deposit – between around 30% per person. This will be requested for cultural tours where visas are required as the airline tickets will need to be issued in order to obtain forex and apply for the visa.
- Balance of payment requested 6 – 8 weeks prior to departure.
- As far as possible, and generally speaking, once a tour is confirmed, representatives from travel companies are happy to attend a parents meeting to discuss various aspects of the tour, answer questions about our company and give advice on overseas touring.
- Reputable tour companies need to be used, eg. Bundu Bashers, Edwin Dowrin Sports Travel, etc. Please note that there are lots of fly-by-night operations, who come in cheaper, but do not include a lot of the tour costs, eg. airport taxes, entrance fees, insurance, etc.

**Cancellation of A Tour**

The College management has the right to cancel any arrangements at any time, although such decision must first be motivated to the tour group and College ExCo within 7 days of such decision being recommended to the entire Tour Committee. Any funds collected will be disbursed within 30 days thereafter, net of any expenditure that may have been incurred and interest earned.

**Checklist**

1	Draft an “in principle” proposal		
2	Proposal must be refined and approved by ManCom		
3	The ManCom approved proposal must be presented to ExCo for approval		
4	Pupils who could be considered must be vetted by the finance department and adjustments made if necessary.		
5	An “expression of interest” letter must be sent to parents.		
6	If there is sufficient interest, the tour proposal can be finalized.		

7	The final budget must be approved by the finance department		
8	The final proposal must be approved by the Headmaster		
9	The finalized tour proposal <b>must</b> be presented to a general meeting of potential parents to confirm their level of commitment		
10	Provisional team selection can then take place and deposits called for		
11	Approved fund raising can commence		
12	Tour departs		
13	Tour returns		
14	Financial Reconciliation		