

Contracted Proposal Instructions

Club Crabtowne, Inc.

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INSTRUCTIONS

1. Be sure to make copies, for yourself, of everything you submit.
2. Select the correct Trip Proposal Form for your trip.
3. Get forms from the appropriate Committee Chair, a Board member; or download them from the website.
4. Fill out Trip Proposal Form and Newsletter Article/ Announcement.
 - A. Make sure you include all pertinent information.
 - B. Add up costs, including the **5% Activity Fee**. (Remember the Trip Leader is responsible for the Activity Fee and will owe it back to the club if it is spent. See Policies.
 - C. Attach all **contracts** (if appropriate) to Trip Proposal Form.
 - D. The correct number of **Comps** may be applied or not. See Policies.
 - E. Make sure you have obtained the SSN or Federal Tax Identification Number and address for all **businesses or vendors to whom we will pay more than \$600**. The mailing address to Federal Form 1099 is often different from the address to which we make trip payments.
5. Have the Committee Chair look over and **sign** the proposal.
6. Make **13** copies of your completed proposal and get it to the next Board of Directors Meeting for approval.
7. If approved, it will be placed into the next Newsletter. The Newsletter Article **MUST** be **emailed** to the newsletter editor, newsletter liaison and newsletter publisher no later than the day after the board meeting. Each trip must appear in at least one newsletter. It is recommended, depending on the activity, that you give each trip at least time to be in 2 newsletters.
8. After your trip is approved, sell your trip at meetings, and/or via emails and phone calls.
9. Transmit monies, using financial forms to the treasurer, within two weeks of being received.
10. When the trip is completed, fill out all appropriate financial forms and send it to the Treasurer within 30 days of the completion of the trip. A Final Report Form must be filed by every Trip Leader. If your trip **Cancels**, also send a **Final Report Form** (marked cancelled) to the Treasurer so your account can be closed.
11. Be sure to get participant's signature on a **Waiver**. Make all participants aware of the **Cancellation Policy**, also with the participant's signature. Two people may not sign one form. And if you are going on an expensive, overnight and/or overseas trip, it is recommended that you get a copy of the participants **Health Insurance Card** and a copy of the participants **Passport** (overseas trip) and carry them with you on the trip. It is also recommended that you highly recommend or include in the cost of your trip **Trip Cancellation Insurance** and **Evacuation Insurance**. The Club is not responsible for cancellations or accidents and the Trip leader has a responsibility to stay with the trip.
12. Trip Leaders are not authorized to overspend on their trip. Only the Board of Directors has the authority to approve cost changes. Expense charges must be approved in advance. Failure to get the Board of Directors approval may result in loss of comp or non-reimbursement for over-expenditures.

*If you need assistance you can get information from the committee chair, the Treasurer or any other board member.