



OSHER@Dartmouth

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STUDY TRAVEL HANDBOOK

10 Hilton Field Road, Hanover, NH 03755 * (603) 646-0154 * OSHER@dartmouth.edu



OSHER@Dartmouth Study Travel Handbook

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OSHER@Dartmouth
Study Travel Handbook

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I. Purpose

The OSHER@Dartmouth Study/Travel Committee (STC) plans, schedules, arranges, and oversees study/travel (S/T) programs for OSHER@Dartmouth members. Trips may involve domestic or foreign travel. A unique feature of our trips is that participants attend courses of study related to the trip as a prerequisite. In developing these trip-related courses, the STC ascertains what areas members are studying and exploring.

If an OSHER@Dartmouth member comes to the STC with a proposal for a specific program, the Committee will evaluate it and a decision on whether to accept the proposal will be made. If accepted, the member proposing the program will be invited to join the STC for the duration of the program.

Every trip will have a Trip Coordinator, who may be a member of the STC or other OSHER@Dartmouth member.

II. Definitions

- A. TOUR OPERATOR:** An outside organization that offers travel programs, sometimes called a trip wholesaler.
- B. TRIP COORDINATOR:** The member(s) of OSHER@Dartmouth, usually on the STC, responsible for managing all aspects of a S/T program from initiation to completion and who actually lead(s) the travel portion of the program. An assistant may be assigned to help with the trip responsibilities.
- C. CURRICULUM COMMITTEE MEMBER:** Person assigned by the Curriculum Committee to assist a Trip Coordinator in the necessary course development.
- D. TRAVEL AGENT:** The independent organization selected to handle air or other transportation not offered by the Tour

Operator. The Travel Agent may assume the duties of the Tour Operator.

- E. **TOUR DIRECTOR:** The individual(s) assigned by the Tour Operator to supervise/accompany the travel segment of the program.
- F. **LOCAL GUIDES:** Individuals selected by the Tour Operator to oversee local portions of the itinerary.

III. OSHER@Dartmouth Policy

It is OSHER@Dartmouth policy that Trip Coordinators shall receive no compensation as a result of their activities. Any discounts offered by Tour Operators, Travel Agents, etc. shall be shared equally by all participants in the program.

IV. Study/Travel Committee Policy

- A. **Implementation of Policy:** Regarding OSHER@Dartmouth S/T programs, the Trip Coordinator and all STC representatives shall have full authority to implement OSHER@Dartmouth policy as it relates to the STC.
- B. **Course Requirements:** Course study prior to the trip is a prerequisite for travel with OSHER@Dartmouth. The course requirement(s) will be set for each trip by the STC. In certain situations, the STC may consider courses taken within the last two years related to, but not specifically developed for, the trip in question to qualify towards the study component requirement(s). Any exceptions to the above are at the sole discretion of the STC.
- C. **S/T Program Participation:** Granting or denying participation in a S/T program is at the sole discretion of OSHER@Dartmouth through the STC and its program representatives. OSHER@Dartmouth may revoke admission or terminate participation in an S/T program at any time, including

during the travel segment. Reasons for revoking admission or terminating participation are as follows: if, in the opinion of OSHER@Dartmouth representatives, a participant's condition or behavior or conduct becomes problematic, inappropriate or disruptive to the health, safety, and/or well-being of other participants and/or would undermine the reputation of Dartmouth College or OSHER@Dartmouth.

D. Problem Participant Procedure: Problems should be addressed as soon as possible. If a problem occurs prior to the travel portion of a program, the Trip Coordinator's first step should be to speak directly to the individual about the problem and strive for resolution. If a problem persists, legal counsel should be consulted.

During a trip, resolution of a problem should be a joint effort of the Trip Coordinator and the Tour Director.

E. S/T Program Cancellation: The STC reserves the right to cancel travel programs when, in the opinion of OSHER@Dartmouth or its representatives, the health, well-being and/or safety of participants requires such action. Cancellation may also occur when the number of participants falls below the minimum number established for the program either by OSHER@Dartmouth or the Tour Operator. In such a case, cancellation may be initiated either by OSHER@Dartmouth or by the Tour Operator.

F. Wait List: If a Tour Operator establishes a maximum number of participants for an STC program, and the number of interested OSHER@Dartmouth members exceeds the maximum, the STC or the Tour Operator shall establish a waitlist on a first-come-first-served basis. Individuals will only be accepted on the wait list upon receipt of their deposit.

G. Travel Insurance: OSHER@Dartmouth *strongly recommends* that trip participants carry insurance coverage for medical care needed during the course of a sponsored trip, as well as for trip interruption expenses necessitated by evacuation to another facility or the traveler's home as recommended by medical professionals, or the repatriation of remains of a deceased

traveler. The cost of medical treatment and/or relocation and evacuation can easily amount to tens of thousands of dollars or more and must often be paid in cash. A waiver releasing Dartmouth College and OSHER@Dartmouth of any liability or responsibility for medical care, evacuation, or tour costs must be provided to OSHER@Dartmouth no later than the final payment date for the trip being undertaken. Waiver forms will be available from the OSHER@Dartmouth office. (See Appendix F)

As most policies covering overseas travel require the bill to be paid at the time of treatment, with reimbursement by the insurance company after the trip, participants should be prepared with readily available funds during the trip in anticipation of possible emergencies.

While pre-departure trip cancellation coverage is not required, OSHER@Dartmouth strongly recommends that travelers also consider such coverage. Baggage loss coverage is also advisable. (See Appendix A)

Travelers should also be aware of the “pre-existing conditions” clause in many health insurance policies and take proper steps, where possible, to avoid loss of coverage.

H. Independent Travel: Those participants who make their own travel arrangements from their home to the point of initiation of a travel program must recognize they are responsible for getting to the starting point on time with no assistance from the Tour Director or the Trip Coordinator.

I. Tour Operator Deposit: Deposits and refund policies are determined and handled by the Tour Operator.

V. Study/Travel Program Selection

A. Membership Preferences: S/T Travel Program selection will take into account membership preferences. A summary of the responses to the most recent questionnaire on membership preferences distributed to the OSHER@Dartmouth

membership by the STC is presented in Appendix J. It is suggested the STC distribute similar questionnaires to the membership at least every two years to remain current.

B. Program Selection Process: Prospective Study/Travel programs may be suggested by STC members and OSHER@ Dartmouth members. The level of detail of the planning will be determined by the STC, but planning will generally include the following processes:

1. A proposed program is discussed and approved in principle by the STC (see proposal form in Appendix B).
2. The Leadership Council is advised by the report from the STC Chair.
3. The Trip Coordinator recommends, with the assistance of the STC, possible study courses, including a qualifying course(s) given in the recent past, and works with the assigned Curriculum Committee member to contact prospective study leaders.
4. The Trip Coordinator evaluates information from at least three Tour Operators when multiple programs are available, and recommends a Tour Operator (see Appendix C).

VI. Program Implementation

A. Program Publicity: Following publicity in the OSHER@ Dartmouth newsletter, an information/marketing announcement prepared by the Trip Coordinator, assisted by the STC and the ILEAD office, is sent to the entire OSHER@ Dartmouth membership describing the S/T program and inviting those interested to attend an information meeting. The information meeting should be held sufficiently in advance of the publication date of the next course catalog so that, if the membership response is favorable, course and study/travel program descriptions and information can be prepared for the catalog.

- B. Information Meeting:** An advisory statement to prospective participants from OSHER@Dartmouth and a checklist of the key information that should be conveyed at the information meeting is given in Appendix It is desirable to have a representative of the Tour Operator present. Prospective travelers should be informed of the deadline for sending in their deposit. The deadline should fall sufficiently in advance of the course catalog deadline to allow for preparation of course outlines and the program description for inclusion in the catalog.
- C. Meeting Follow-up Letter:** Immediately following the information meeting, a follow-up letter including a summary of all matters discussed should be sent by the Trip Coordinator to all members who have expressed interest, especially those who could not attend the meeting. The letter should include a summary of all matters discussed at the information meeting and also cover important questions asked at the meeting. This letter can also be used by the OSHER@Dartmouth office in communicating to members who express interest after the meeting.
- D. Final Decision:** Shortly following the deposit deadline, it can be determined whether there is sufficient interest for the STC to proceed with the program.

VII. Trip Coordinator

- A. Attributes:** The ideal Trip Coordinator walks on water and may never be seen in our lifetimes; however, the attributes of a good leader include the following:
1. Interest in the area of the proposed study and travel.
 2. Travel experience.
 3. Ability to work with people who have different needs and personalities.
 4. Organizational skills and detail orientation.
 5. Flexibility to deal with sudden changes in schedule or

emergencies.

6. Ability to handle stress and to solve problems creatively and diplomatically.
7. Ability to make decisions and stick with them.
8. Ability to negotiate with vendors.
9. Ability to articulate and convince.
10. Patience.
11. A sense of humor.

B. Mentors for Trip Coordinators: Because of the importance of the Trip Coordinator, it is strongly recommended any new Trip Coordinator meet with counterparts from previous S/T programs. Mentoring can be very helpful. There is also a reference book in the OSHER@Dartmouth office that has copies of all the trips OSHER@Dartmouth has done.

C. Responsibilities of the Trip Coordinator (and assistant) Prior to Travel

1. Oversee/manage all aspects of the S/T program from inception to completion. Trip Coordinator will copy OSHER@Dartmouth office with all communication between the Trip Coordinator and the Tour Operator.
2. Prepare the initial S/T program proposal for STC consideration.
3. Recommend a Tour Operator for STC approval.
4. Recommend study courses and course leaders, with the assistance of the assigned Curriculum Committee member, for the study portion of the program for STC approval. Identify and propose recent courses that would qualify as meeting the study program requirements.
5. Create the initial promotional letter to be distributed to the OSHER@Dartmouth membership by the OSHER@Dartmouth office soliciting indications of interest in the proposed S/T program.
6. Schedule and conduct the initial information meeting for prospective participants.
7. Prepare for distribution a follow-up letter to all prospective participants covering all information presented at the

meeting

8. Confirm with Tour Operator how trip package is distributed.
9. Arrange with the OSHER@Dartmouth office for possible group transportation between Hanover and the local airport.
10. Prepare for distribution occasional information/newsletters to participants prior to actual travel. Distribution of such material at course meetings will reduce mailing costs. One of these mailings should include a checklist of suggested clothing, documents, travel precautions, etc. (see sample lists and letters in Appendix E).
11. Send list of travelers to all participants and notify them of itinerary changes.
12. OSHER@Dartmouth office will distribute Dartmouth College release form and OSHER@Dartmouth Health/Emergency Information form (see Appendix F & G) to all participants and make sure all responses are returned and are complete prior to travel. These forms must be on file in the OSHER@Dartmouth office at least ten days before any participant begins travel. The Trip Coordinator should carry two copies of the Health/Emergency forms on the trip.
13. Trip Coordinator may suggest social get-togethers prior to travel to allow travelers to become better acquainted with each other.
14. Remain at all times in close contact with the OSHER@Dartmouth office staff, which will be assisting in various aspects of the program. Provide OSHER@Dartmouth with a daily itinerary and the necessary contact information for each day.

G. Responsibilities of the Trip Coordinator During Travel

1. Coordination with Tour Director
 - a. Check on daily plans and make sure travelers are informed of the schedule.

- b. The Tour Director will deal with problems relating to the itinerary, accommodations, events, times, places, transportation, meals, roommates, etc. and assist travelers needing special help on route.
 - c. The Tour Director will make sure each person has a room assignment when arriving at a new hotel before leaving the lobby and make adjustments as needed. Ask local tour guide for list of room assignments in case you need to contact someone later.
2. Arrive early for bus trip to plane (if part of program).
3. Arrange for group check-in if possible at the departure desk. Having travelers wear their nametags may be helpful. Electronic/Internet tickets should be available at the issuing airline departure desk at the time of travel. Remind participants to carry their travel confirmation number (record locator).
4. Assist Tour Director in handling baggage problems.
 - a. Remind participants to attach baggage tags sent by tour operator to their luggage.
 - b. If luggage is lost, have traveler file a report immediately (with airline if at airport) to initiate search process. Provide future itinerary with addresses and telephone numbers. Get airline representative's name, position, and telephone number. Ask for free toilet kit or whatever the airline will advance for temporary supplies. Usually, luggage catches up within a day.
 - c. If luggage is damaged, have traveler file claim before leaving airport. Get agent's name, position, and telephone number.
5. Make sure that lost passports are reported to local police immediately. Accompany traveler to American Consulate or Embassy if possible. Fill out an affidavit stating how long you have known the individual. Take your passport with you. Ask traveler to bring a photocopy of his or her passport. The Consulate or Embassy may be able to issue a

new permanent passport. If not, a passport limited to three months will be issued.

6. Warn travelers to carry more than one credit card and photocopies of all cards, passport and telephone numbers for reporting loss. Remind travelers to alert their bank/ credit card issuer of their travel plans.
7. Warn all travelers before travel of the dangers of theft and pick-pocketing and the ordinary precautions that all travelers should take to reduce risk. In the event of loss, file loss report with local police immediately and obtain copy of filing for later use with traveler's insurance company.
8. Have group wear nametags during group activities such as when going through customs and security. Advise all to be patient, honest, and courteous.
9. Maintain high visibility. Look for problems before they become obvious and address them.
10. Always be on time as an example to fellow travelers. Deal promptly with participants who are habitually late.
11. Be prepared to deal with accidents, illness, or death. With assistance of Tour Director, obtain necessary medical treatment and assist in arrangements for payment. Communicate with participant's emergency contact if necessary. In case of death, assist Tour Director in arrangements and stateside shipment of remains and in obtaining several copies of death certificate in English that will be required for later estate settlement. Hotel, airline and ship personnel are familiar with dealing with these situations.
12. Distribute the OSHER@Dartmouth evaluation form upon completion of the travel portion of a program to all travelers (one for each spouse or traveling companion). Examples of evaluation forms are given in Appendix H.
 - a. See that all forms are returned promptly so the analysis may be as comprehensive as possible.
 - b. Analysis of the returned forms should be conducted by the Trip Coordinator.

- c. The information sought in the evaluation form may include:
- 1.) Overall rating of the program.
 - 2.) Study course(s) taken.
 - 3.) Trip organization, including information provided.
 - 4.) Trip Coordinator(s).
 - 5.) Tour Director and Local Guides provided by Tour Operator.
 - 6.) Meals.
 - 7.) Accommodations.
 - 8.) Itinerary.
 - 9.) Pace of trip.
 - 10.) Air travel.
 - 11.) Other transportation provided.
 - 12.) What aspects of the trip the traveler especially liked.
 - 13.) How trip could have been improved.
 - 14.) Indications of future travel interests.

E. Post Travel Responsibilities: The Trip Coordinator prepares a comprehensive write-up of the entire Study/Travel Program as a permanent OSHER@Dartmouth record for use by future STC members in planning and running programs (see write-up checklist in Appendix I). After review by the STC, the Trip Coordinator files the report, the participant evaluations analysis and related program documents in the OSHER@Dartmouth office in the special folder containing write-ups of all past programs.

Appendix A Travel Insurance

OSHER@Dartmouth travel insurance requirements must be discussed thoroughly with S/T program participants, usually at the initial trip information meeting and in the follow-up letter to participants. **However, travelers are urged strongly to consider also pre-departure trip cancellation coverage.** Among the other types of insurance travelers may wish to consider are the following:

- 6) Post departure trip interruption
- 7) Medical care during travel
- 8) Traveler death
- 9) Acts of Terrorism
- 10) Theft (purse, money, credit cards, personal belongings, etc.)
- 11) Trip Delay/Missed Connections
- 12) Itinerary Change
- 13) Expenses of family members visiting during illness
- 14) Prescription Drugs
- 15) Replacement of Eyeglasses
- 16) Baggage Loss or Damage
- 17) Baggage Delay
- 18) Common Carrier Accidental Death or Dismemberment
- 19) Travel Assistance Services/Hot Line

Make travelers aware Medicare *rarely* covers medical expenses outside the United States, so additional medical coverage is necessary.

Many medical insurance policies contain a clause disallowing coverage of *pre-existing conditions* if the policy is not purchased within a specific number of days after the initial payment is made by the traveler to the Tour Operator. To ensure coverage, travelers must read the insurer's policy and conditions carefully and act promptly. In some instances the Tour Operator may offer a travel insurance policy, either as part of the "package" price or as an added cost. The following is a list of travel insurance vendors, services, and web sites travelers may wish to contact: **This list does not represent an endorsement by OSHER@Dartmouth.**

1. Travel Guard International (www.travelguard.com)
2. Access America (www.accessamerica.com)
3. The Travel insurance comparison site www.InsureMyTrip.com
4. Global Care Inc. Alpharetta, Georgia (www.globalcare.net)
5. Travelex Insurance Services (1-800-228-9792) (www.travelex-insurance.com)
6. Council Travel, Cambridge, MA (1-800-626-2427)
7. Travel Insured International (Travelers Insurance) (1-800-243-3174)
8. travel.state.gov: Website that provides a list of hospitals and doctors in many countries.
9. www.cdc.gov/travel: U.S. Government Center for Disease Control website providing health advisories for travel to specific countries.
10. www.who.int: World Health Organization website
11. Embassy/Consulate assistance with emergencies:
 - a. U.S. and Canada 1-888-407-4747
 - b. Overseas 1-202-501-4444

Appendix B
Program Proposal Checklist

Program Name _____

Timing

Season _____

Year _____

Travel (Itinerary) _____

Study Courses

New: Course Leader _____

Applicable Past Courses _____

Tour Particulars

Length _____

Mode of Travel _____

Physical Requirements _____

Total Estimated Cost to Participants _____

Tour Operator "Package" _____

Air and other Transportation (if not included above)

Required Insurance _____

Tour Operators Evaluated (minimum of 3) and recommended Operator when multiple similar offerings are available

1. _____ 2. _____ 3. _____

Trip Coordinator _____

Comments: _____

Date submitted: _____

Appendix C

Tour Operator Selection

The selection of a Tour Operator for a S/T program is the responsibility of the Trip Coordinator with final approval of the STC. The Trip Coordinator may consider some of the following questions when evaluating tour operators.

1. How long have you been in business and how many travelers do you handle annually?
2. What is your past experience with the travel program OSHER@ Dartmouth is considering?
3. Who are the principals of your company and what are their backgrounds?
4. Who is the key contact person OSHER@Dartmouth will be dealing with and what is his or her experience and background?
5. Will you provide client and banking references?
6. What are your present credit and banking references?
7. Will you provide a list of your organization's travel industry memberships and affiliations?
8. Do you allow travelers to pay *in full* by major credit cards?
9. Do you offer travel insurance? Who is the carrier and what is the cost and nature of the coverage? What is that company's A.M. Best rating (financial strength rating)? Does your company have a financial interest in offering this coverage?
10. How flexible is the itinerary of the program OSHER@ Dartmouth is considering?
11. How much "free" time is included in the itinerary?
12. **COSTS**. What expenses are *included* in your package price?
 - a. Transportation to starting point
 - b. Meals
 - c. Accommodations
 - d. Tips (if not included, get guidelines for tour guide and bus driver)
 - e. Optional excursions
 - f. Other

13. If air transportation is provided may participants upgrade either by additional payment or by using frequent flyer miles?
14. What expenses are **excluded** from your “package” price? What is the estimated cost?
15. Do you provide discounts or free programs based on the number of travelers in a group or for group leaders? If so, please document.
16. Describe any pre- or post-trip extensions to your program and the cost thereof.
17. What is your payment schedule? On what date is the first payment due?
18. What is your refund policy?
19. Is the package price guaranteed or, if not, under what circumstances would it change?
20. What are your policies regarding eligibility of prospective participants?
21. What are your policies regarding the dismissal from a tour of participants who, during travel, exhibit conduct that is inappropriate or disruptive to the health, safety and/or well being of other participants?
22. What is the educational component delivered in your program?
23. How do you secure or assist in securing enrichment lectures during travel? What is the typical background and experience of such lecturers and can you provide references? Are the lectures in English?
24. What types of educational materials do you provide to travelers prior to departure?
25. How do you select local guides and what is the background and experience of guides assigned to the program OSHER@ Dartmouth is considering?
26. How do you handle accidents and medical emergencies? Describe incidents that may have occurred on this program in the recent past.
27. Do you provide dietary alternatives for travelers (vegetarians, religious orders, dieters, individuals with allergies)?

Appendix D

Information Meeting and Follow-up Letter Checklist

- I. The following statement should be conveyed at the information meeting for prospective travelers:
- To enjoy your trip to the fullest, you should be in good physical and mental health. Any limiting restrictions should be reported at the time of registration.**
- OSHER@Dartmouth reserves the right to decide whether to accept, reject, or retain any traveler who is likely to, or does, infringe on the rights, welfare or enjoyment of others. Participants may be required to carry their own luggage during the trip. Luggage weight and size must conform to the regulations of public carriers and tour operators and will generally be limited to one suitcase and one carry-on piece.**
- II. The list of information below should also be presented during the information meeting. In addition it should be used in preparing the follow-up letter mailed immediately after the meeting to all who have expressed interest. The follow-up letter should also cover important questions brought up at the meeting
1. Name of Trip Coordinator and Assistant
 2. Destination
 3. Dates of travel
 4. Name of Tour Operator
 5. Proposed itinerary
 6. Size of group and operation of wait list (if required)
 7. Physical requirements of program (walking, stairs, luggage, etc.)
 8. Estimated trip cost (including **all** expected expenses except discretionary purchases)
 9. Tipping
 10. OSHER@Dartmouth and STC Policies (refer to Manual)
 - a. Eligibility: only OSHER@Dartmouth members
 - b. Study requirements: courses to be offered and qualifying recent courses

- c. Travel insurance: Accident/illness medical care during travel and post-departure trip interruption/cancellation/medical evacuation required
- d. Trip cancellation by OSHER@Dartmouth
- e. OSHER@Dartmouth right to deny participation or end travel
- f. Non-refundable deposit requirement
- g. Health
- h. Independent travel at end of trip
- i. Signup procedures: deadline and confirmation form
- j. Air travel arrangements if not part of Tour Operator package
- k. Transportation arrangements if not part of Tour Operator package
- l. Social get-togethers
- m. Traveler newsletters and checklists
- n. Dartmouth waiver and OSHER@Dartmouth registration forms
- o. Signup deadlines

Appendix E

Sample Travelers Information

DO NOT LOCK YOUR CHECKED LUGGAGE UNLESS YOU USE A TSA LOCK

Items to bring in your CARRY-ON, not in your checked bag:

- Film and camera
- Any digital items
- Prescription drugs and eyeglass prescription
- Copies of documents (passport, air ticket, etc.)
- Valuables such as binoculars (leave all but costume jewelry at home)
- Toilet kit, makeup
- Change of clothing
- Sleepwear
- Antiseptic towelettes
- Reading material
- 3-oz containers for fluids
- Make sure your name is on your camera, binoculars, and other valuable items.

Items NOT to bring in your carry-on:

- Swiss army knife or any kind of knife
- Scissors
- Metal nail file
- Corkscrew, can opener

Suggested Packing List:

- Shoes: comfortable, with non-skid heels
- Face cloth and soap (not all hotels supply them)
- Travel alarm clock
- Moist towelettes
- Small container of laundry soap for handwash
- Plastic bags to use for socks, underwear, small items, dirty or wet laundry
- Plastic clothes line
- Fold-up raincoat and fold-up umbrella

Diary or logbook, pens

Tiny flashlight

Converter/adaptor for hairdryer, etc.

Batteries for camera, etc. (film, memory cards, etc.)

Copies of documents (passport, air ticket, etc.)

Make sure your name and address are clearly visible inside your checked luggage in case it must be opened for identification.

Please check the TSA website as regulations change (www.tsa.gov)

Appendix F
Waiver

This document is important. By signing this document, you are assuming certain risks and waiving certain rights, including a right to sue. Please read it carefully before signing it.

***ACKNOWLEDGEMENT OF TERMS OF PARTICIPATION
AND RELEASE, WAIVER OF RIGHT TO SUE, AND
INDEMNITY AGREEMENT***

As a condition of participating in the OSHER@Dartmouth sponsored trip

to _____, from _____ to _____
(the Trip) I acknowledge that I am responsible for my own health and safety and that neither OSHER@Dartmouth nor Dartmouth College has an obligation to provide supervision or oversight for my health and safety. The Trip involves risks of personal injury, property damage, and other risks associated with traveling. For example, some of these risks may involve but are not limited to the following:

- travel safety with various modes of transportation
- the nature of accommodations
- handling of baggage
- exposure to disease
- authority of foreign government and application of foreign laws
- fluctuating currency rates
- restrictions on visas, passports, and customs
- terrorism

I freely agree to assume all such risks in connection with this trip.

My participation in this Trip is completely voluntary and I understand the nature and extent of the risks associated

with the Trip. I acknowledge that the Trip has inherent risks, including but not limited to those described herein, as well as injury resulting from or associated with transportation, both to and from the Trip location and well as during the Trip, whether provided by ILEAD or not; injury and expense resulting from the need for and/or ability to receive medical treatment, relocation, and evacuation; and injury resulting from or associated with sightseeing, participation in Trip programming, and living accommodations, including crime, theft, or personal or property damage; injury I further acknowledge that some or all of these risks may expose me to the danger of serious bodily harm, injury, and even death.

22

I further **assume the risk of all injury, expense, and property loss** as a result of my participation in the Trip and do RELEASE ILEAD and the Trustees of Dartmouth College, its agents and employees, on behalf of myself, my executors, heirs and next of kin, and assigns, from **any loss, damage, and claims or cause of action arising out of or related in any way to my participation in the Trip**, whether caused by the negligence of ILEAD and/or Dartmouth College or otherwise; and

INDEMNIFY AND HOLD HARMLESS ILEAD and the Trustees Dartmouth College, their agents and employees from any and all claims and costs arising directly or indirectly out of any of my activities, acts and omissions while on this trip.

I HAVE CAREFULLY READ AND UNDERSTAND COMPLETELY THE ABOVE PROVISIONS AND VOLUNTARILY SIGN THIS RELEASE, WAIVER, HOLD HARMLESS, AND INDEMNITY AGREEMENT.

Signed: _____ Date: ____ / ____ / ____

Print name: _____

Appendix G
OSHER@Dartmouth TRAVELERS
HEALTH/EMERGENCY INFORMATION FORM

(Two copies required)

PLEASE WRITE LEGIBLY

Name of Tour _____ Program Dates _____

Name _____

Address _____

Home Tel. _____ Age _____ Birth Date _____ Sex F/M

Blood Type _____

Do you have any MEDICAL CONDITIONS such as allergies, heart disease, emphysema, diabetes, seizures, depression, injuries, recent surgery, etc. – that would be important to know about in case of an emergency or RESTRICTIONS such as impaired vision, hearing, breathing, limited mobility, etc. – that would require special equipment or personal assistance for you to be able to participate in this program?

NO YES If yes, to either question, please specify:

Please list generic name of any medication(s) you take regularly,
reason(s) for taking said medication(s) or write "NONE":

Primary Care Physician _____ Telephone _____

Name of Trip Medical Insurance Company(s)

Policy # _____

Person to notify in the event of accident or medical emergency
(someone other than your traveling companion):

Name _____ Relationship _____

Address _____

Telephone Number(s) to call Home _____

Work _____

Cell Phone _____ Email _____

Signed _____ Date _____

Appendix H

STUDY TRAVEL EVALUATION

It is important to future OSHER@Dartmouth travel that we have feedback from trips taken. Please fill out the following form and return to: Osher at Dartmouth, 10 Hilton Field Road, Hanover, NH 03755.

1. Was your general impression of the trip a positive one? YES NO

Comments _____

2. Were the travel arrangements to the airport satisfactory? YES NO

The overseas flight? _____

3. Were the OSHER@Dartmouth courses helpful in preparing you for this trip?

Too much _____ Just right _____ Not enough _____

4. How many courses did you attend? Full length _____ Mini _____

5. How did you find the following physical arrangements? Please comment:

Lodging _____

Food _____

Local Transportation _____

6. What did you think of your tour guide? _____

7. Was the trip too physically strenuous? Too long? Please comment in detail on any problems.

8. Was it a good season of the year for this trip? _____

9. Was it appropriately priced? _____

10. Suggestions for future trips: _____

11. Additional comments: _____

Appendix I

S/T Program Write-ups

At the completion of a S/T program, the Trip Coordinator should prepare a summary of the program to provide a permanent record for future reference that is kept in the OSHER@Dartmouth office. The analysis should contain *constructive* conclusions about both the good and bad features of the program. We wish to learn from our errors and capitalize on our successes. The following is an outline of the information that would be helpful. The report should be accompanied where appropriate by exhibits such as itinerary, traveler list, traveler newsletters, etc.

1. Name of program and dates of travel
2. Location of travel (attach itinerary)
3. Participants (attach list)
4. Name of OSHER@Dartmouth Trip Coordinator (if a different individual)
5. Name of Curriculum Committee Liaison
6. *Total* base cost of trip per participant and how cost compares with other organizations offering similar trips.
7. Tour Operator: Would you recommend using this Tour Operator again? If not, why not?
8. What OSHER@Dartmouth study courses were offered and who were the course leaders?
9. Did Tour Operator have an evaluation questionnaire and what were the major findings?
10. What were the major findings of the OSHER@Dartmouth traveler questionnaire? (attach sample questionnaire and evaluation summary)
11. What lessons should be remembered in planning future programs? Discuss both successes and problems.

Appendix J

Member Recommendations From Previous Trips

1. OSHER@Dartmouth members have traveled all over the world. A favorite overseas destination is Europe. Interest in future travel is strong, both overseas and in North America.
2. Two week trips are the most popular, but there is also interest in trips of shorter duration ranging from day trips to those of a few days. This response suggests the need for closer coordination with the Special Events Committee that historically has run shorter trips.
3. Good food and comfortable lodging are rated moderately to very important by most participants. Menus should accommodate travelers with dietary restrictions.
4. Responders prefer smaller groups of under 30 participants.
5. Preference in mode of travel is flexible except for a general dislike of large cruise ships of the “love boat” variety.
6. In addition to “seeing the sights,” responders expressed strong interest in programs that include theatre, music, history, art, and architecture. Opportunities to meet local residents were also mentioned.
7. Spring and fall are the preferred times of travel.
8. What participants have enjoyed most about past OSHER@ Dartmouth S/T programs:
 - a. Getting to know their OSHER@Dartmouth companions, in courses and during travel.
 - b. Good planning and organization.
 - c. Good guides.
 - d. Good food and accommodations.
 - e. Interesting course leaders and study courses whose content is related to the later travel segment.
9. What participants have disliked:
 - a. Too “busy” a schedule and feeling hurried. This response suggests a “hub and spoke”
 - b. Approach to the itinerary in which travelers remain in a hotel for more than one day and participate in day trips

to nearby sites.

- c. Too large a group.
- d. Overlap/redundancy between information presented in OSHER@Dartmouth courses and that provided by local guides during travel.
- e. High program costs, particularly where there is the perception of less expensive alternatives.

