

## ***Leader Check List ~ Domestic Travel Process***

### **Initial research**

- \_\_\_\_\_ Visit with Director of Global Opportunities on questions, campus travel process, resources
- \_\_\_\_\_ Work with department or group to determine purpose of trip (what and why learning objectives)
  - \_\_\_\_\_ Enrich course content with on-site field experience
  - \_\_\_\_\_ Expose students to another culture through co-curricular activity
  - \_\_\_\_\_ Provide high impact experience through off-campus travel
- \_\_\_\_\_ Research possible trip activities, locations, timeframes, etc. to meet trip purpose
- \_\_\_\_\_ Check with department chair / supervisor to pursue next steps

### **Making a plan**

- \_\_\_\_\_ Review ***Travel Management Resource*** sections at [wp.cune.edu/travelmanagement](http://wp.cune.edu/travelmanagement)
- \_\_\_\_\_ Read through the ***Off-Campus Activity and Travel Guide*** (WP site)
- \_\_\_\_\_ Contact organizations at destination for local support needs – look at providers available
- \_\_\_\_\_ Complete a ***Proposed Trip Application*** (WP Site)
  - \_\_\_\_\_ Trip details (name, location, dates, onsite contacts, etc.)
  - \_\_\_\_\_ Budget details (be as specific as possible – include contingency funds)
  - \_\_\_\_\_ Leaders / Supervisor signatures
  - \_\_\_\_\_ Submit ASAP (must be approved in time to be included in annual campus budget deadline in ***BudgetPak***)

### **Campus approval & financial process**

- \_\_\_\_\_ Campus administration committee will review application and be in contact if updates are needed or if application is approved
- \_\_\_\_\_ Business office will work with you to generate new account (if needed)
- \_\_\_\_\_ Meet with Institutional Advancement Office if any fundraising is anticipated
- \_\_\_\_\_ All contracts need to be reviewed by General Counsel and signed by campus CFO
- \_\_\_\_\_ Put trip budget into ***BudgetPak*** template by spring campus budget deadline
- \_\_\_\_\_ Work with department chair to list trip related class in appropriate course list for registration

### **Trip promotion**

- \_\_\_\_\_ Create campus promotion (announcements, posters, chapel slides, etc.) after trip approval
- \_\_\_\_\_ Host information meetings
  - \_\_\_\_\_ Share trip location, dates, purpose, activities, participation criteria, etc.
  - \_\_\_\_\_ Share application process, link, and deadline
  - \_\_\_\_\_ Share trip costs, deposit and payment process and deadlines (including personal costs to anticipate)
  - \_\_\_\_\_ Share detailed information so participants can make an informed decision on joining trip

### **Online application process**

- \_\_\_\_\_ Provide Director of Global Opportunities with ***Confirmed Trip Details*** form (WP site) needed to build specific trip brochure and application on the ***VIA TRM*** online site – with trip leader access added
- \_\_\_\_\_ Students complete trip application in ***VIA***
- \_\_\_\_\_ Trip leader reviews applications and determines if accepted
- \_\_\_\_\_ Director of Global Opportunities accepts students and additional forms are deployed to students
- \_\_\_\_\_ Students commit to trip and complete additional forms (health, emergency contact)

### **Remind participants to follow up on next step details**

- \_\_\_\_\_ How and when to pay deposit and make future trip payments
- \_\_\_\_\_ Register for class (if needed)

### **Travel arrangements for group**

- \_\_\_\_\_ Research air & ground transportation needed
- \_\_\_\_\_ Work with any host organization on local arrangements (transportation, food, lodging, etc.)
- \_\_\_\_\_ Verify full participation from group members before booking (paying) for arrangements
- \_\_\_\_\_ Collect and track all income/expenses for the experience

### Preparation meetings / Preparation materials

- \_\_\_\_\_ Share detailed site and activity information with group as well as travel task deadlines
- \_\_\_\_\_ Share any health/safety details with group
- \_\_\_\_\_ Develop group covenant on group behavior and appropriate contact expectations
- \_\_\_\_\_ Check for any special needs accommodations for individuals (if needed)
- \_\_\_\_\_ Distribute and review travel plans, itinerary, and emergency contact information for participants/parents
- \_\_\_\_\_ Distribute packing lists, what to bring / what not to bring for the trip

### Final details

- \_\_\_\_\_ Meet with Business **two weeks prior to departure** – check trip balance – verify deposits will cover expenses
- \_\_\_\_\_ Complete **Final Trip Plan** (WP site) and details, **no later than two weeks prior to departure**.
  - \_\_\_\_\_ Leaders contact information
  - \_\_\_\_\_ Onsite contact information
  - \_\_\_\_\_ Travel mode/Flight itinerary
  - \_\_\_\_\_ Trip/Daily schedule
  - \_\_\_\_\_ Housing info/Site contact info
  - \_\_\_\_\_ Group list (csv document)
- \_\_\_\_\_ Director of Global Opportunities will put trip details in **Via Travel** for campus administrators access
- \_\_\_\_\_ Follow campus notification process if students need to be excused from classes
- \_\_\_\_\_ Contact US Bank (pcard) with locations and dates of travel
- \_\_\_\_\_ Review **Clery Campus Security Authority Training** and review of **Campus Crisis Response Guide** (WP site)
- \_\_\_\_\_ Make copies of participant information (see below)

### Materials carried by leader

- \_\_\_\_\_ **Health & Medical Information** for all students (access in VIA)
- \_\_\_\_\_ **Emergency Contact Information** for all students (access in VIA)
- \_\_\_\_\_ **Medical Consent** forms for minors only (WP site)
- \_\_\_\_\_ Emergency contact numbers (host organization, airline, campus, etc.)

### While on event

- \_\_\_\_\_ Orient participants to the location specific expectations and safety guidelines for site
- \_\_\_\_\_ Lead group in daily activities – hold daily devotions/debriefing – encourage journaling to process experience
- \_\_\_\_\_ Contact VP for Student Affairs in case of any emergency situations

### Upon return

- \_\_\_\_\_ Complete **Clery Act - Student Trip Reporting Form** (WP site) upon return - submit to General Counsel
- \_\_\_\_\_ Debrief with group / celebration with group
- \_\_\_\_\_ Visit with VP for Student Affairs if any student issues to report
- \_\_\_\_\_ Share any relevant Concordia stories with Marketing department
- \_\_\_\_\_ Arrange for final expenses to be paid and make sure trip account balances
- \_\_\_\_\_ Send thank yous to any supporters

### Other details to consider along the way

- \_\_\_\_\_ Determine fundraisers and coordination (if needed)
- \_\_\_\_\_ Assign tasks to team members to support the group/team while on experience
- \_\_\_\_\_ Share stories with campus and larger community before and after experience

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