Leader Check List ~ Domestic Travel Process

See the Travel Management Word Press site for items referenced below: wp.cune.edu/travelmanagement (WP site)

Initial research

____ Visit with Associate Provost on campus travel process, questions, 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, activities, etc. to meet trip purpose
____ Check with department chair / supervisor to pursue next steps

Making a plan

____ Review the ***Travel Management*** resource sections at **wp.cune.edu/travelmanagement**
____ Read through the ***Off-Campus Activity and Travel Guide*** (WP site)
____ Contact organizations at destination for local support needs – check providers available
____ Complete a ***Proposed Trip Application*** – link on WP site to application in VIA)
- Trip details (name, location, dates, leaders, onsite contacts, etc.)
- Can save and complete later – cannot be edited once submitted

____ Complete ***Trip Funding Worksheet*** – download from WP site in Via application
- Be as specific as possible – include medical insurance, contingency funds, etc.
- Upload to complete ***Application*** submission

Campus approval & financial process

____ Application is reviewed – updates requested if updates needed or message received if application is approved
____ Business office will generate new account (if needed)
____ Meet with Institutional Advancement Office for permission on any fundraising anticipated
____ Forward provider contracts to Associate Provost and CFO who reviews and signs all campus contracts
____ Put trip budget into ***BudgetPak*** template by spring campus budget deadline
____ Work with department chair to add trip-related class to course list for registration

Trip promotion

____ Complete ***Confirmed Trip Details*** and provide photos (Via site) needed to build specific trip brochure and application on the ***VIA TRM*** online site – with trip leader access added
____ Create campus promotion (screens, announcements, posters, chapel slides, GO emails, 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

Student online application process in *Via*

____ Students complete and submit application in **via-go-cune.via-trm.com**
____ Trip leader reviews submitted applications in **via-go-cune.via-trm.com** and determines if accepted
____ Work with ***Via Administrators*** to accept (or not accept or waitlist) students for trip
____ Students receive email message from Via to commit to trip – once they commit, additional forms are then deployed on their ***Via*** home page to complete (passport, health, emergency contact)

Remind participants to follow up on next step details

____ Provide outline on how and when to pay deposit and make future trip payments
____ Remind students to register for class (if needed)

Travel arrangements for group

____ Verify full participation from group members before booking (paying) for arrangements
____ Research air & ground transportation needed – see WP site for flight and travel resources
____ Work with host organization on local arrangements (transportation, food, lodging, etc.)
____ Collect and track income/expenses for the experience

Preparation meetings / Preparation materials

____ Share detailed site and activity information with group as well as travel task deadlines
____ Develop group covenant on personal behavior and appropriate conduct expectations as group members
____ 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 to check trip balance and verify income will cover expenses **two weeks prior to departure**
____ Complete and provide these final trip details **at least two weeks prior to departure**
    ____ **Final Trip Plan** (form on WP site)
    ____ **Basic itinerary** (word document that includes travel itinerary - daily schedule – hotel/housing details)
    ____ **Group list** (csv document on WP site)
____ Return materials to **Via Administrators** to put trip details in ***Via Travel*** for campus administrators access
____ Follow campus notification process if students need to be excused from classes
____ Review ***Clery Campus Security Authority Training*** and review ***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 18 or under (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 campus COO in case of any trip emergency situation

Upon return

____ Complete ***Clery Act - Student Trip Reporting Form*** (WP site) upon return - submit to General Counsel
____ Debrief with group / celebrate with group
____ Visit with Associate Provost to share any photos, feedback, issues that occurred
____ Visit with VP of Student Affairs if any student issues to report
____ Share any relevant Concordia stories with Marketing
____ 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 prior to and while on experience
____ Share stories with campus and larger community before and after experience