

GROUP TIMELINE AND CHECK LIST

Group Leaders should complete the following checklist as they prepare for domestic and international student trips.

For tours, please refer to [Academic Tour Director Timeline and Checklist](#).

One year prior to travel

- Become familiar with relevant [travel policies and procedures](#) pertaining to the tour experience.
- Complete the [Group Travel Application](#).
- Complete the [Travel Authorization Form](#).
- Once the group has been authorized, review outcomes (and update where necessary). Make plans to achieve outcomes.
- Determine what courses will be offered in conjunction with the trip and contact the Registrar's Office to get those courses set up for the respective semester.
- Establish parameters and schedule of the application process.
- Begin marketing and recruiting efforts.
- If you have a website, make sure information pertaining to the trip is current.

Ongoing throughout the year (Travel Plans and Arrangements)

- Consult with the BYU-Idaho Travel Office (2340) in regards to your plans for the tour and what resources you will need from their office.
 - The Travel Office generally makes arrangements for airlines, hotels, and ground transportation while the group leader arranges for onsite trip experiences and activities (i.e. museums, historical sites, conference, etc.).
 - Please be aware that the President, Vice Presidents, and personnel in the Purchasing & Travel Office are the only parties authorized to sign binding contracts for the university.
- Consult with Accounting (Dawn Shirley; 1997) to discuss the proper use of group travel card.
- Account for the following details in your planning:
 - Set the fee and work with Accounting to set up student payments. Make sure that **all** student travel expenses are included in the fee. This may include (but is not limited to):
 - Transportation
 - Lodging
 - Meals (number of meals to be determined by the group leader and clearly communicated to the students)
 - Admission fees for all on-site activities
 - Insurance
 - Transaction charges
 - Gratuities

- Provide for adequate supervision during the trip considering appropriate care for both genders.
- Provide a minimum of 3 advisors present at all times. The minimum is generally sufficient. If you feel there is a need for more supervision, please consult with the Academic Affairs Officer before making arrangements for additional supervisors.
- Designate back-up advisors who will assume responsibility in the case that the group leader cannot continue in his or her responsibility.
- Define the nature of each activity and seek to minimize the risk for participants. Clearly define the “*zone of safety*.”
- Make arrangements to attend regularly scheduled church meetings in conjunction with your travel plans.
- Arrange for any required driving permits.
- Contact Treasury/Risk Management Coordinator (Tyler Andreasen; 1972) in regards to:
 - Travel purchasing cards
 - International HTH Insurance (required for all participants and should be part of the tour fee)
 - Participants’ need for personal health insurance
- Determine communication strategy on keeping participants sufficiently notified and up to date on pertinent information (i.e. itineraries, deposits, payments, commitments, behavioral expectations, safety issues, eligibility to participate, etc.).
- Determine necessary training for participants in preparation for the experience and plan accordingly.
- Gather necessary information (this can be done as part of the application process).
 - Copy of participant passports for international travel
 - Medical history
 - Emergency contact information (next-of-kin)
 - [Assumption of risk](#)
- Ensure that each participant has successfully completed the international safety and cultural awareness modules.
 - Students can access these trainings by going to the student tab on their BYU page, then to Academic Forms, then to Academic Tour Training.
- Notify the Academic Office Assistant (Leesa Allen; 1125) as changes to itinerary and/or participants arise. She will disperse the updated information to other necessary university departments.
- Establish a communication plan.
 - Who will you need to contact in the case of an emergency?
 - How will you keep participants up to date on changes in itinerary prior to and during the experience?
 - How will students reach you if they get separated from the group while abroad?
 - How can parents stay informed of their child’s safety?

- Hold meetings with group to discuss itineraries, deposits, payments, commitments, behavioral expectations, safety issues, eligibility to participate (Honor Code or academic holds, etc.).
- Have student meeting prior to departure to include a pre-boarding discussion and training regarding:
 - Dress
 - Safety
 - Emergency response
 - Cultural and church appropriate behavior

One month prior to departure

- Register trip through [U.S. Embassy](#) for international travel.
- Seek opportunities to tie up loose ends, finalize logistical information, and communicate finalized plans to participants.
- Consider international travel implications for cell phone usage. For BYU personnel on university plans, consult with the Sprint Kiosk to determine the best course of action for minimal expense to employees and the university.
- Consult with Accounting (Dawn Shirley; 1997) regarding best practices for tracking expenses and other financial matters while abroad.
- Provide name list (with names on passports, date of birth, gender, and I#) to the Travel Office by the given deadline.

Two weeks prior to departure

- Make two files with copies of passports of each participant. One file will be left with the academic department hosting the trip, and the other will be kept on hand by the group leader while traveling.
- Send the final itinerary (including hotels and phone numbers) and comprehensive list of participants with contact information to the Academic Affairs Officer who will disperse the information to necessary university departments.
- Contact issuer of credit cards to be used while abroad and make them aware of your travel plans to ensure your card is not shut down when foreign charges are incurred.

48 Hours prior to departure

- A final security analysis will be conducted by the Academic Affairs Officer to ensure the safety of planned itinerary. In cases where intolerable safety risks have developed, changes in the itinerary could be required.
- Consult with Accounting (Dawn Shirley; 1997) to discuss cash advances and ATM pulls.

While traveling

- Keep all students within the “*zone of safety*.”
- Send an occasional update to the Academic Affairs Officer on the experience and well-being of the group.
- Track expenses and receipts to be turned in for reconciling the tour account.

Post Experience

- Send reconciliation statements and receipts to Dawn Shirley in the Accounting Office.
- Administer post experience surveys and measure the outcomes of the experience.