Academic Tour Director Timeline and Checklist

One year prior to travel

- ☐ Review the academic purpose of the travel experience and secure support from the Department Chair and College Dean.
- ☐ Become familiar with relevant travel policies and procedures pertaining to the tour experience.
- ☐ Fill out the Overnight Student Travel Authorization form and submit to the Travel Administrator. (Leesa Allen) The tour account will be set up upon receiving authorization for the tour and the tour director and office assistant will have access to add students and track payments.
- ☐ Determine what courses will be offered in conjunction with the tour. Contact Student Records and Registration at coursescheduling@byui.edu to get those courses set up for the respective semester.
- ☐ Establish parameters and schedule of the application process.
- ☐ Begin marketing and recruiting efforts.
- ☐ Look over your tour's website to make sure information pertaining to the current tour and future tours are current. (Template)

Travel Plans and Arrangements

- ☐ Consult with the BYU-Idaho Travel Office in regards to your plans for the tour and what resources you will need from their office.
    - The Travel Office generally makes reservations for airlines, hotels, and ground transportation while the Tour Director arranges for onsite tour experiences and activities (i.e. museums, historical site excursions, etc…)
    - If you desire to work with an external travel agency, please contact the Travel Office to get quotes and assistance in selecting the level of optimal service for your tour group and the University. The President, Vice Presidents, and Purchasing & Travel Office are the only parties authorized to sign binding contracts for the University.
    - If the tour is authorized to use a travel agency, please provide the detailed itinerary from the agency to the Travel Office as well as the Travel Administrator.
    - Reservation insurance should be purchased for each student participant from the student tour fee (while not exceeding the cap) if it is offered through the approved travel agency.
- ☐ To apply for a group travel card, complete the application and submit to Valerie Gutierrez in Financial services.
- ☐ Contact Dawn Shirley (x1997) regarding Group Tour Payments, Expense Recording, and Group Travel card procedures
- ☐ Account for the following details in your planning:
    - Set the tour fee **(current fee cap is $4200)**
    - Make sure that ***all*** student travel expenses are included in the fee. This may include (but is not limited to):
        - Transportation
        - Lodging/Housing

        - Meals (number to be determined by the Tour Director and clearly communicated to the students)
        - Admission fees for all on-site activities
        - Insurance
        - Transaction charges
        - Gratuities
    - Provide adequate supervision during the trip considering appropriate care for both genders.
        - Thoroughly review the Supervision Policy for traveling with students.
        - When arranging chaperones, include male and female faculty supervision before requesting spouse chaperones
        - The advisor/student ratio for international travel is 1:15 (1:20 for student performance tours and/or domestic travel), with a minimum of three advisors. If you feel there is a need for more supervision, please consult with the Travel Administrator before making arrangements for additional supervisors.
    - The tour should not exceed 25 days (including travel time).
    - Designate back-up advisors who will assume tour responsibility in the case that the director cannot continue in his or her responsibility. This may mean that another leader needs to meet up with the group in order to keep adequate supervision.
    - 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) in regards to:
        - Travel purchasing cards
        - International Geo Blue Insurance (Required for all participants and should be part of the tour fee).
        - Participants need for health insurance.
- ☐ Determine a 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 could be done as part of the application process).
    - Copy of participants passports
    - Medical history
    - Emergency contact information (next of kin)
    - Activity Waiver
- ☐ 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 Idaho page, then to Academic Forms, then to Academic Tour Training.

- ☐ Notify the Travel Administrator (Leesa Allen) as changes to itinerary and/or participants arise. She will disperse the updated information to other necessary university departments.
- ☐ Determine whether Director and Assistant Director(s) will be compensated through administrative load (3 hours for Directors, 2 hours for Assistant Directors) or stipends.
- ☐ If faculty will be taking stipends vs. academic load, submit the Tour Leader Expense Request Form to Leesa Allen. Once approved, academic funds will be transferred to the tour account.
- ☐ Establish a communication plan
  - For emergencies regarding your reservations contact the Travel office at 496-2341, after hours 208-313-5660.
  - For any other emergencies contact the Travel Administrator at 496-1974, after hours 208-243-2604
  - Keep participants up to date on changes in itinerary prior to and during the experience.
  - Plan a communication method for cases where a student(s) is separated from the group.
  - Establish a plan to keep parents informed of their child's safety.
- ☐ Hold meetings with students to discuss itineraries, deposits, payments, commitments, behavioral expectations, safety issues, eligibility to participate (Honor Code or Academic holds, etc.).

One month prior to departure

- ☐ Register your trip through the U.S. Embassy for International travel.
- ☐ Seek opportunities to tie up loose ends, finalize logistical information, and communicate finalized plans to participants.
- ☐ Have student meeting prior to departure to include a pre-boarding discussion and training regarding:
  - Final plans
  - Dress
  - Safety
  - Emergency response
  - Cultural and church appropriate behavior
- ☐ Consider international travel implications for cell phone usage. For BYU Idaho personnel on university plans, consult with the Sprint Kiosk (3469) to determine the best course of action for minimal expense to employees and the university.
- ☐ Consult with Accounting (Dawn Shirley) regarding best practices for tracking expenses and other financial matters while abroad
- ☐ Provide participant 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 for each participant. One file will be left in the academic department hosting the trip, and the other will be kept with the group leader while traveling.

- ☐ Send the final itinerary (including hotels and phone numbers) and a comprehensive list of participants with contact information to Leesa Allen. She will disperse the information to necessary university departments. (not less than 3 days prior to departure)
- ☐ 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.
- ☐ Consult with Accounting (Dawn Shirley) to discuss cash advances and ATM pulls.

48 Hours prior to departure

- ☐ A final security analysis will be conducted by the Travel Administrator to ensure the safety of the planned itinerary. In cases where intolerable safety risks have developed, changes in the itinerary could be required.

While traveling

- ☐ Keep all students within the "zone of safety."
- ☐ Send updates to the Travel Administrator on the experience and well-being of the group.
- ☐ Track expenses and receipts for reconciling the tour account.

Post Experience

- ☐ Send reconciliation statements and receipts to Dawn Shirley in the Accounting Office.
- ☐ Work with the Travel Administrator and the Accounting Office to reconcile and close the tour account.
- ☐ Submit Assessments to Measure Outcomes to the Travel Administrator and the department chair.
- ☐ The travel administrator will administer the post experience survey and report results to the tour director and department chair.