

Planning Essentials

Introduction, Orientation, and Overview

Planning Exploratory Travel:

Proposing – Submit travel proposal with detailed budget, travel plans/itinerary, and rationale to Deans of College and Academic Affairs. Proposals accepted and considered on rolling basis. Final deadline for proposals: **March 1**.

Implementing – Ideally, in order to leave adequate time for final course proposal preparation, exploratory travel will be completed *no later than* one month prior to final cost estimate deadline (Aug 1 for Spring courses, so exploratory travel would be completed by **July 1**).

Follow-up – Upon return, results of exploratory travel will be communicated to Dean for Academic Affairs and worked into travel course proposal.

Planning and Proposing Travel-component Courses:

If travel will be a component of a NEW course, the course proposal must be submitted to the division no later than **Mar 31** for consideration at the last division meeting of the Spring semester, one year prior to travel (i.e., late Spring 2015 for a Spring 2016 travel component course). This new *course* proposal need not include *travel* proposal details.

Proposal budget draft should be completed by **Aug 1** to allow discussion and adjustment in consultation with Dean of Academic Affairs and travel coordinator. Budget should account for minimum number of students/ max cost as well as *target* numbers. Budget should include added 10% contingency for air travel (if fares are projected to be \$1000, budget for \$1100) and additional 15% contingency added to the total cost of the trip (if the total course budget is \$2000, the final cost would be \$2300). If costs fluctuate significantly before the students' final payment, this contingency cost will be adjusted accordingly.

If travel component is part of an existing course, the full proposal for the travel course (with preliminary budget) is due to division and travel coordinator by **Aug 31** for consideration at the first September division meeting. The proposal moves from the division to APCC to the budget committee. Decision notification in late September.

Plan informational sessions as soon as positive decision notification is received. Strive to offer more than one session, each at different times of day. Advertise widely. Open application period.

Administrative timeline, if course is approved:

- **October**: communicate full travel cost to Office of Financial Aid. The office will calculate 15% deposit on full cost of travel, financial aid offset, and student final cost, and these figures will be communicated to students prior to Spring registration.

- **November:** Students register for travel-component course on permission-only basis – evaluations of applications will have been completed by instructor and permission numbers provided to eligible/selected students.
- **Late November:** Instructor, travel coordinator, and registrar coordinate production of spreadsheet with student rosters and costs to begin processing of payments. Provide spreadsheet to financial services.
 - o Refundable placeholder deposit of \$150 paid to financial services within 24 hours of registration; deposit held in financial services
- **January:** Non-refundable deposit of 15% of full cost due at close of schedule adjustment (add/drop/swap). Deposit applied to travel SmartKey (SK). Final travel balance communicated to students.
- **January and following:** travel costs start accruing to SK.
- **Spring:** deadlines for final payment: Jan 31 for spring break travel; Mar 31 for May travel.
- **All payments** paid directly to financial services by check or cash (no credit card at this time) and deposited to SK as appropriate.

Graduation: At this time, students traveling in May will receive Incomplete grades in the allied course and will graduate officially in summer term. Students will not apply for Spring graduation, but these students are otherwise eligible to walk (and will receive a “blank” diploma) at May commencement. Summer graduating students apply for summer graduation at the start of summer term.

General First Steps and Pre-planning

Seek a faculty/staff co-facilitator early. Co-facilitator should have demonstrated expertise/competence in area appropriate to course content and/or travel location.

Review the [US State Department’s traveler’s checklist](#) and [students abroad](#) sites. [Embassy](#) and consulate information as well as several travel planning tools can be found at this link. Consider registering your travel with destination embassies/consulates using the State Department’s free [Smart Traveler Enrollment Program](#) (STEP).

Review immunization needs well in advance, allowing enough time for certain vaccines to take effect. Please visit [Emory’s TravelWell Clinic](#) to speak with a travel health professional regarding your itinerary.

Consult [ISOS](#) for in-country information, required immunizations, and travel warnings and safety tips.

Plan to have the following with you at all times: ISOS membership card, the nearest [U.S. embassy](#) contact information, Oxford College emergency contact number (Dean of Academic Affairs and any administrative support staff), and a charged cell phone that works abroad. [Example of wallet card](#).

Keep electronic and physical copies of all documentation (passports, visas, ISOS membership cards, and prescriptions). Keep one set of copies on site and one set back at Oxford with travel coordinator or administrative staff.

Review Emory’s legal primer, [travel and expense policy](#), and [research guidelines](#) if applicable.

If you are leading a group that includes any Emory College students, you also should [contact the Center for International Programs Abroad](#) (CIPA).

Plan to conduct at least one early orientation (perhaps at informational sessions) and one pre-departure orientation for your participants to review the following as appropriate:

- Logistics: what to bring, required documentation, immunizations, in-country information, etc.
- Communicate to participants the total cost associated with the trip and identify means to provide assistance for anyone who cannot meet these costs.
- Provide a thorough written checklist of expectations and goals for the trip. Ensure that all participants have reviewed this checklist.
- Recommend that group members have cell phones that work internationally
- Obtain emergency contact information from your group members and determine whether participation releases are needed. Contact the [Office of General Counsel](#) for more information.
- Walk through ISOS and its services. Illustrate how best to use ISOS prior to, during, and after your trip.

Passports and Visas

As students register, confirm that you and all members of your group traveling have up-to-date passports. Recommend that family members *also* have current passports/visas in case a family member is needed overseas in an emergency.

Obtain any necessary [visas or permits](#) for your destination (all traveling group members must do so). Ensure your passport is valid for the length of time required for a visa (often six months after your planned departure from your destination) even if you do not need a visa for this particular travel.

Again: Keep electronic and physical copies of all documentation (passports, visas, ISOS membership cards, and prescriptions). Keep one set of copies on site and one set back at Oxford with travel coordinator or administrative staff. Have students keep a copy at home as well.

Travel Arrangements

Book airfare through one of [Emory's three air travel agencies](#) after obtaining necessary departmental approval for your travel. **Book accommodations.** Emory's travel agencies can assist in booking accommodations in many international destinations. Before booking, review information on [paying for your travel](#). You should also read Emory's [sponsored program travel](#) information if applicable.

Arrange local ground transportation at your international destination. If you are renting a car, review driver's license and insurance requirements.

Make sure to use a reputable travel company to arrange for in-country transportation and choose the safest accommodations. For assistance, see our [country guides](#).

Prepare for your financial needs while traveling. Notify [Emory Corporate Card](#) of your travels to avoid having your account frozen for suspected fraudulent activity. Cash advances are available in certain circumstances; requests must be filed **one month** in advance. [Tips on banking abroad](#)

Phones: Arrange for [mobile phones](#) that will work at your destination. In some cases, a local (to the destination) or global SIM card is sufficient; in others it may be necessary to rent a phone or make other such arrangements.

Plan for [Atlanta airport parking](#) or ground transportation. Be sure the students can have access to the dorms if there is a delay before departure.

Health and Insurance

Make sure all group members **obtain health insurance** that can be used overseas; see below for travel insurance provider for supplemental insurance for students and yourself. You generally need a set itinerary for booking insurance. **Review [Emory's international package policy](#)** and determine if you (and other traveling faculty/staff) need any additional insurance coverage.

Provider:

T.W. Lord & Associates
25 Dodd Street
P.O. Box 1185
Marietta, Georgia 30061

Phone (770) 427-2461
Toll-Free 1-800-633-2360
Fax (770) 429-0638

Emergency Preparedness

Consult [ISOS](#) for in-country information, required immunizations, and travel warnings and safety tips. ISOS allows Oxford to locate and assist you in case of emergency. **Create a profile for yourself and register your travel with [ISOS](#)** and ensure each group member creates an ISOS profile as well. Each profile should include the following information: trip itineraries, passports and visas, medical histories, and emergency contacts. If group members are traveling during their free time, have them include their itinerary. When purchasing your plane ticket through Emory's three air travel agencies, your air itinerary is automatically registered with ISOS as a benefit to Emory travelers. However, if your airfare or hotel accommodations were booked outside of Emory's travel agencies or if your travel plans change, [upload your itinerary](#) before your departure.

Ensure all travelers have signed any required legal waivers.

Develop an emergency plan. ISOS can assist you with specific details, e.g. appropriate hospitals to use.

Other suggested inclusions from [here](#):

- Entry, exit points, and group assembly points,
- An evacuation plan,
- Emergency response contact details for: ambulance services/hospital/doctor; police; program staff and program administration; relevant government agencies (embassy, consulate, local immigration, national police)
- Alternate methods of communication when reliable telecommunications fail,
- A plan in case of the inability to communicate between designated emergency leaders and contingency plans for situations involving the loss of a program leader,
- A system for accessing emergency health and consent information for program participants.

Conduct an in-country orientation once you have arrived at your destination to review the following:

- Review the logistics, goals, and expectations covered prior to the trip.
- Communicate all contingency plans to the group. Ensure that all travelers know what to do in case of emergency.
- If anyone is traveling on their own during the trip, make sure to obtain their itinerary.

Additional Resources

General Travel Checklist! <http://global.emory.edu/support/travel/index.html>

Planning Group Travel Checklist! http://global.emory.edu/support/travel/leading_group_travel.html