Group Travel Training

Presented by:
- Student Activities Office
Why Have a Travel Workshop?

- To help you plan your trip
- To put you in the best situation for your trip
  - Your safety is priority one!
- To better prepare you to budget for your trip
- To help you make sustainable travel choices
Reasons for Travel

- Service Trips
- Conferences
- Dances
- International Travel
  - Work with SAO far in advance
  - Contact OIS for forms and approval
- Competitions
  - Athletic Clubs – work with Dave Brown
- Anything else?
- Consider your group’s mission when planning a trip
Types of Transportation

- **Personal Vehicle**
  - Only in St. Joseph (IN) county, if approved

- **Charter Bus (approved vendors only)**
  - Contract should be turned in 5 business days before the trip

- **Public transportation**
  - TRANSPO, South Shore, Coach USA bus to Chicago airports
  - Airlines -- O’Hare, Midway, or South Bend Regional

- **ND Transportation Services Office**
  - Minivans, sedans; long-distance or local
  - Submit the Transportation Services Vehicle Request form immediately after submitting the SAOnline request (go to sao.nd.edu, “Forms and Paperwork”)
  - All drivers must attend vehicle training (see Transportation Services to schedule a training session)

- **Students are not permitted to go directly to rental car companies**
  - University insurance only covers drivers when renting through Notre Dame

- **Consider the Time, Place, and Manner of the trip**
Day Trips – In County

- Types of trips
  - Service
  - Dance at Century Center (Charter bus company required)
  - Dinner

- Transportation
  - Personal Vehicles (Only in St. Joseph (IN) county, if approved)
  - ND Transportation Services Office
  - Public Transportation
  - Charter bus company (approved vendors only)

- High Risk Trips
  - Anything that includes physical activity

- Notes to Know:
  - A University representative may be required
  - A waiver will be required
  - Gas costs will not be reimbursed for personal vehicles
  - If transporting children, make sure to talk with SAO ahead of time
Day Trips – Out of County

- **Types of Trips**
  - Symphony in Chicago
  - Shopping trip to Michigan City
  - Visiting club counterpart at another institution

- **Transportation**
  - ND Transportation Services Office
  - Public Transportation
  - Charter bus company (approved vendors only)

- **High Risk Trips**
  - Anything that includes physical activity

- **Notes to Know:**
  - A University representative may be required
  - A waiver will be required
Overnight Trips

- **Types of Trips**
  - Conferences
  - Tours

- **Transportation**
  - ND Transportation Services Office
  - Public Transportation
  - Charter bus company (approved vendors only)

- **High Risk Trips**
  - Anything that includes physical activity
  - Protests

- **Notes to Know:**
  - A University representative WILL be required
  - A waiver will be required
  - Trips may not conflict with academic classes unless traveling for educational purposes
  - Groups must be off the road when driving between 12 midnight – 6 am
Waivers and Trip Behavior

- Waivers must be signed by all students who participate in club/organization/hall trips.
  - This waiver will be emailed to the Event Coordinator and Advisor once the SAOnline request has been submitted.
  - This waiver should be turned into SAO before departing on the trip.
  - Service Clubs have been provided with a year-long waiver.

- As you are representing your group and Notre Dame on this trip, please remember to uphold University policies (including *duLac*), and adhere to laws and policies established by the site you are visiting.
Extenuating Circumstances

- Emergency procedures
  - Weather -- could affect your trip
- Depending on the details of your trip, certain requirements may be made:
  - Advisor may be required to attend
  - Checking in with SAO
  - What other details or circumstances can you think of?
- Contingency Plans
Important Questions to Ask

- Is this a trip our club/organization/hall should pay for?
- Who should go on this trip?
- How much should each person contribute to the costs?
- Are meals covered in the conference fee, or do your members need to bring their own cash for meals and other incidentals?
  - Should your club/organization/hall be covering these items?
- Are you expecting your University representative to pay for his/her own expenses? What are his/her expectations?
- If traveling by air, how will you get to the airport?
  - i.e. Public transportation to O’Hare/Midway or personal vehicle to South Bend Regional?
- How will you travel once you reach your destination?
  - i.e. Do you have cash for cabs?
Finances

- Out of pocket expenses versus FOAPAL account expenses...how much should the group cover?
  - Consider Student Union Fiscal Policies and/or Club Coordination Council Division Guidelines for undergraduate clubs

- Work with Anthony Travel for:
  - Airline or hotel arrangements

- Work with Deb Acrey, Student Union Treasurer’s Office Bookkeeper for:
  - Conference Fees/hotel/air reimbursements
    - Hotel payments must be made with a University check
  - Toll, meals or other reimbursements
    - Do not skip tolls!

- Don’t expect your University representative to cover expenses on the trip -- Plan ahead:
  - i.e. Who will pay for dinner on the trip and be reimbursed when you return?

- Trips that cost more than $5000 need to be approved by Financial Management Board – fmb@nd.edu
Timeline

- Meet with David (clubs) or Amy (halls) as soon as you identify travel need. For graduate / professional student clubs, see Joshua
- Identify University representative to accompany overnight travel
- Complete SAOnline request…
  - At least 15 business days before an out of county trip.
  - At least 10 business days before an in county trip.
  - Necessary before making any travel arrangements or payments
- As soon as SAOnline request is approved and travelers are identified:
  - Register for conference/seminar
  - Book air/hotel/transportation
    - Anthony Travel, or
    - Deb Acrey, Student Union Treasurer’s Office Bookkeeper
      - Payments for hotel can only be made with a University check
  - If traveling by charter bus, turn in contract for approved charter bus company to SAO 5-7 business days in advance
- Send itinerary of conference/event to Peggy at sao@nd.edu
Timeline, cont.

- **Two Weeks before**
  - Make contact with local alumni club for support and networking
  - If traveling by ND rental van, submit the ND Transportation Request to SAO

- **One Week before**
  - Have members sign waivers – return to SAO before travel
  - Pick up check for conference/travel payments from Deb Acrey
  - Remind members to bring their own money to pay for meals not covered
Follow Up

- When you come back –
  - Turn receipts into Deb Acrey
    - All receipts need to be itemized and signed by your advisor
    - Remember all toll, meal or other receipts
    - Receipts need to be turned in no later than 45 days after the event to receive a reimbursement for travel and entertainment expenses
  - Make sure all waivers were turned into SAO before you departed for the trip
Tips for Planning

- Assign a Trip Leader. Responsibilities include (but are not limited to):
  - Contact location to confirm dates, times, directions, etc.
  - Communicate details of trip to group
  - Take attendance
  - Collect numbers and emergency information of all those attending the trip
  - Collect fees and waivers; deposit fees and send waivers to SAO prior to departure
  - Ensure that your group picks up their vans from transportation and returns them safely and with no incident
  - Assign driver(s) to vehicle(s). Ensure that this person has been driver trained through Transportation, and has a valid license with them.
    - Rotate your drivers
  - Here are emergency numbers to give all those attending the trip
    - Campus Police – 574-631-5555
    - Student Activities Office – 574-631-7308
    - Trip Leader(s)’ number
Tips for Planning

- Assign a Financer. Responsibilities include (but are not limited to):
  - Keep record of all club/hall/organization money spent
  - Decide ahead of time who is paying for meals on the trip, the individuals or the group? If the group, who is charging the meals to be refunded later?
  - Remind group members to bring cash for incidentals and emergencies.
  - If handling money (collecting trip fees, cash for tolls, etc) bring manila envelopes for money and receipt collection
    - Collect Net IDs and addresses of those you are reimbursing
  - Group money should not be used for:
    - Alcohol, tobacco, and other drugs
    - Personal souvenirs for members
Resources

- Student Activities Office
- Your Advisor
- Center for Social Concerns
  - Especially for service groups
- Each other!
  - Many groups travel at about the same time, sometimes in the same region. Think about share resources such as transportation, hotels, even University administrator!
Questions? Comments? Concerns?

Thank you!