

## **STEP-BY-STEP PROCEDURES FOR DEVELOPING TRAVEL STUDY PROGRAMS**

*(Tasks/responsibilities are shared by program leaders and travel study programs manager.)*

### **FIFTEEN TO TWELVE MONTHS PRIOR TO DEPARTURE:**

- ▶ Identify target audience, tour destination and rationale for offering travel study program.
- ▶ Plan tentative itinerary and dates.
- ▶ Discuss plans with supervisor(s).
- ▶ Read Travel Study Policy (<http://acadaff.uww.edu/handbook/travelpolicy.htm>).
- ▶ Prepare credit special course proposal #7 (<http://acadaff.uww.edu/handbook/procedures-form7.htm>) and submit for institutional approval.
- ▶ Begin on-going dialogue with Office of Continuing Education (for programs designed primarily for non-traditional audiences), or with the Office of International Education (for programs designed primarily for traditional undergraduate/graduate students).
- ▶ Review timeline and procedures; discuss budget (direct and indirect expenses).

### **TWELVE TO ELEVEN MONTHS PRIOR TO DEPARTURE:**

- ▶ With the assistance of the appropriate travel study programs office, develop a RFP and request bids from tour companies or explore arrangements with individual service providers. Things to include:
  - Suggested dates and day-by-day itinerary (Is the tour escorted or unescorted?)
  - Estimated number of participants (potential ranges: 10-14, 15-19, 20-24, 25-29);  
Inquire about free air/land for director(s), other benefits related to group number
  - Lodging requirements/options;
  - Number, type and cost of meals desired;
  - Transportation needs: air, land, water;
  - Other: Speakers, admissions to tourist attractions, city tours, tips, baggage handling, insurance (health & accident; trip cancellation/baggage, etc.);
  - Special requests for tour company, service providers – provide assistance with program promotion (brochure or other); presentation at pre-trip meetings, etc.);
- ▶ Request quotes for services from individual service providers if tour companies are not being asked to bid on entire tour package.

### **ELEVEN TO TEN MONTHS PRIOR TO DEPARTURE:**

- ▶ Examine tour company or other service provider bids. Request additional information if necessary. Negotiate any modifications with the one or two companies that most closely meet your specifications.
- ▶ Discuss terms of contract(s); identify deadline dates for deposits/final payment.
- ▶ Select tour company or other service providers and enter into contractual relationship(s).
- ▶ Finalize budget (identify and include all UWW costs beyond per person package cost);
- ▶ Schedule dates for recruitment meetings and/or pre-trip class sessions.
- ▶ Begin work on publicity (prepare first draft of brochure, announcements, application packet, etc.)
- ▶ Identify mailing lists and other methods of reaching target audience(s).

### **TEN TO SEVEN MONTHS PRIOR TO DEPARTURE:**

- ▶ Finalize any trip modifications.
- ▶ Determine final cost (after adjustments) and participant application/deposit/payment deadlines.
- ▶ Finalize promotional materials/strategies. (These may vary depending upon the targetted audience: brochures are primarily developed for off-campus nontraditional audiences, one-page announcements for campus-based audiences). Add program to UWW and UW System websites, list in upcoming timetables; prepare news releases, radio or cable interviews; schedule and publicize on-campus recruitment/informational meetings.
- ▶ Prepare for recruitment/informational meetings (slides, video, packets of information, etc.)
- ▶ Research immunization requirements (Center for Disease Control website; County Health Office; campus health center).
- ▶ Prepare application/materials packet (cover information, itinerary, application form, terms/responsibilities, UW System Release form, Health Verification, Code of Conduct, passport application instructions, etc.).
- ▶ Set up or assign special org code for deposits and expenses; evaluate budget authority limits.
- ▶ Plan routine procedures for answering requests, handling money.

### **SEVEN TO FIVE MONTHS PRIOR TO DEPARTURE:**

- ▶ Continue promoting program as finances and deadlines allow.
- ▶ Firm up loose-ends with travel agency or other service providers.
- ▶ Receive application forms and deposits (cash or financial aid); send confirmation letter/receipt, register students, etc.
- ▶ Begin compiling participant information (addresses, phone numbers, email addresses, emergency contact info, passport status, roommate requests, etc.).
- ▶ Verify dates of pre-trip meetings and inform participants.
- ▶ Begin preparation of course materials.

### **FIVE TO THREE MONTHS PRIOR TO DEPARTURE:**

- ▶ Collect forms: UW Release, Passport copies, Health Verification, Code of Conduct, etc. Review passport expiration date (passport needs to be valid six months beyond return date of tour)
- ▶ Process credit registrations if they haven't already been submitted to the Registrar's Office.
- ▶ Prepare roommate lists.
- ▶ Make payments to travel agency/service providers; continue dialogue.
- ▶ Evaluate need for credit card; process requests.

### **THREE TO ONE MONTHS PRIOR TO DEPARTURE:**

- ▶ Prepare passenger list:
  - names, addresses, phone #'s, passport #'s and expiration dates; emergency contact info
  - provide copy to Office of Risk Management.
- ▶ Calculate leader/group expenses for group cash travel advance purposes keeping in mind expenses that could be charged directly to credit card; submit request..
- ▶ Prepare list of CISI students or MEDEX participants and submit to company for processing.

### **ONE MONTH TO TWO WEEKS PRIOR TO DEPARTURE:**

- ▶ Check to see if all forms are on file (passport copies, release forms, credit registration, etc.).
- ▶ Meet with participants and/or mail any relevant information (tickets, course materials, etc.)
- ▶ Prepare faculty packet (emergency contact info, credit card, expense report summary forms, receipt pad, faculty MEDEX card).
- ▶ Distribute/mail tickets to each of the participants.

### **FOLLOWING TOUR (WITHIN 10 DAYS)**

- ▶ Submit Travel Expense Report forms (with receipts and daily itemized account of expenses)
- ▶ Collect credits card(s)
- ▶ Submit final grades.