

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 12midnight – 6am



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
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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 Acrey⁷
 - ▶ 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

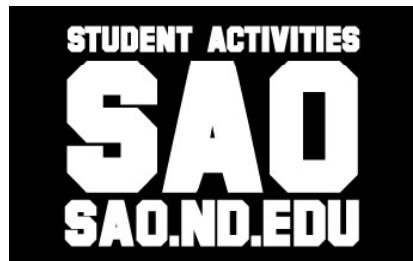
- ▶ **Assign a Financer. Responsibilities include (but are not limited to):**
 - Keep record of all club/hall/organization money spent
 - Decide ahead of time who is paying for meals on the trip, the individuals or the group? If the group, who is charging the meals to be refunded later?
 - Remind group 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!