Checklist for Team Members Preparing to Travel

This checklist is designed for individual and team use in the event that less experienced travelers are participating in an offsite event.

| **TASK**[**i**](#_bookmark0) | **ENTER INFORMATION OR NOTES** | **COMPLETED?** |
| --- | --- | --- |
| **EXCHANGE CONTACT INFORMATION** | |  |
| I have exchanged cell phone numbers with everyone in the group. |  |  |
| I have shared *In Case of Emergency* (ICE) information with other team members. |  |  |
| **TRAVEL ARRANGEMENTS** | |  |
| I am traveling by (e.g., plane, train, bus): |  |  |
| My transportation information is (e.g., airline and flight number, bus line and train number): |  |  |
| My plane, train, or bus departs at (time): |  |  |
| My plane, train, or bus arrives at my destination at: |  |  |
| **LEAVING FOR THE TRIP** |  |  |
| I will get to the airport, train, or bus station by:  *Note: Remember that flights board 30 minutes prior to the departure time on your ticket, and airlines recommend arriving up to 2 hours before your flight time.* |  |  |
| I need to leave my house to get to the airport, train, or bus station on time by: |  |  |
| If I am going to the airport, etc. with someone, their name and cell phone number are: |  |  |
| If I am running late and/or miss my flight/train/bus, I will contact:  *Note: Even if you know you are not going to make your flight, still try to get to the airport as quickly as possible; you could get lucky and your flight could be delayed. If you miss a connecting flight, talk to the person at your airline desk. They will more than likely try to get you on to the next available flight.* |  |  |
| **RETURNING FROM THE TRIP** | |  |
| I will get to the airport, train, or bus station by this time: |  |  |
| I need to leave my hotel to arrive at the airport, train, or bus station on time by: |  |  |
| If I am going to the airport, etc. with someone, their name and cell phone number are: |  |  |
| **AIR TRAVEL PROCEDURES** | |  |
| I know the items that I am prohibited from carrying with me on a plane.  *Note: Airline security will search your carry-on bag for prohibited items. There is always a list posted in the airport of items that you cannot bring on board. These items may include: knives, weapons, any sharp object, mace, pepper spray, lighters, or a large amount of liquids. Check for information on the airline’s website and at the security area.* |  |  |
| I understand the process for going through security at an airport.  *Note: Typically, laptop computers must be removed from your carry-on bags, any outer garments like jackets and sweaters must be removed, shoes must be removed, and any items that may trigger security devices must be removed from your pockets (cell phones, other electronic devices, belts, change, etc.).*  *Do not lock your suitcase or TSA staff will break the lock to check baggage.* |  |  |
| *I WILL BRING AN APPROVED PHOTO ID THAT IS NOT EXPIRED FOR SECURITY.*  IDs can be a driver’s license, passport, or other government-issued identification card. |  |  |
| **HOTEL** |  |  |
| I have made hotel reservations and my confirmation number is: |  |  |
| The name, address, and phone number of the hotel that I will stay at are: |  |  |
| I will be sharing a room with (if applicable): |  |  |
| I have arranged for hotel incidental charges to be covered. This may include a credit card or $50 cash for a deposit when registering at the hotel, or I have spoken with the team lead and this will be covered by the organization.  *Note: Most hotels require a credit card on arrival for what they call incidentals (charges to your room such as movies, minibar, food at hotel restaurants, or items at hotel shops). Take care not to place unnecessary charges on your hotel room bill.* |  |  |
| If a block of rooms is being reserved by one person at the hotel and team members are traveling separately, this person has made sure a list of team member names has been shared with the hotel.  *Note*: *Only the person who reserved the block can give permission for team members to check in and access their* *rooms separately.* |  |  |
| **WHAT TO PACK** |  |  |
| I checked the temperature and weather forecast for my destination and packed the appropriate clothing.  *Note: Bring appropriate clothing for the weather where you are going. To see what the temperatures will be, check the Internet at weather.com or a newspaper (for example, USA Today).* |  |  |
| I understand what “business casual” attire means and have packed accordingly. |  |  |
| I brought a sweater or jacket.  *Note: Remember that hotels and conference centers are typically kept very cold, so consider bringing a jacket or sweater to keep warm in the conference center.* |  |  |
| I brought activities for down time (e.g., books, magazines, iPod, tablet, writing materials, etc.).  *Note: Remember that you are responsible for your own property.* |  |  |
| I brought toiletries (e.g., toothpaste and brush, hair supplies, cologne, deodorant, shaving supplies, make-up, etc.) if I don’t like what the hotel supplies.  If I carry on my liquid, cream, gel, aerosol, and/or toothpaste toiletries, I will make sure each one weighs no more than 3.4 ounces (100 ml) and that all these toiletry containers fit into one 1- quart clear zip lock plastic bag in order to clear security. |  |  |
| I brought my insurance/medical cards, medical bracelet if applicable, medications (including a few extra days’ supplies), and necessary medical equipment in my carry-on luggage. |  |  |
| My charger(s), car keys, contacts/glasses, and a change of clothes are packed in a carry-on, just in case my bags are delayed. |  |  |
| **EXPENSES** |  |  |
| The expenses to be covered are (e.g., airplane travel, ground transportation (e.g., taxi or Uber) to and from the airport both at home and at the meeting location, meals, baggage check, tips, etc.) are: |  |  |
| I know if I will be reimbursed after the trip or if I will receive a per diem check in advance or on-site. |  |  |
| I have created a budget for my funds so that I can track my expenses and not exceed the amount that I will be reimbursed for.  *Note: Be sure that you don’t run out of funds!* |  |  |
| I will save receipts to document my expenses. |  |  |
| I have contacted my bank and/or credit card company to let them know that I’m traveling, so they do not put a hold on my account when I make charges out of state. |  |  |
| **PREPARE FOR THE MEETING** |  |  |
| I have met with my team traveling to the Conference/Summit/Meeting to discuss travel arrangements and expectations. |  |  |
| I have read the agenda of workshops and activities for the meeting, so that I can plan which activities I am interested in attending. |  |  |
| I have talked with my team to make plans for out- of-conference time.  *Note: The meeting is a time for learning and sharing your experiences and expertise to help others, but there will be time for fun, relaxation, talking, and getting to know each other.* |  |  |
| I am registered for the meeting and have confirmation.  *Note: Save a copy of the email confirmation.* |  |  |
| I have completed a meeting wellness plan. (optional) |  |  |

i Adapted from Youth Travel Tips Developed by the Technical Assistance Partnership for Child and Family Mental Health.