



Group Travel PLANNING

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Group Travel / Office of Finance & Treasury

GROUP TRAVEL PLANNING CHECKLIST - For groups traveling on the same itinerary

- Determine destination(s)
- Determine travel dates - outbound and return
- Determine approximate number of travelers

TIP: As soon as you know your destination, travel dates, and number of travelers, we can secure air quotes.

- Contact Susan Godfrey with trip details
 - Obtain group air quote or discuss transportation needs with Susan
 - If needed, obtain budget estimate for entire trip/program from Susan
 - Submit application to raise credit card limit if necessary to accommodate trip charges
 - [Application to increase credit limit](#)
 - Select air carrier and flights. World Travel will secure airline contract and provide critical dates/deadlines for air contract.
 - Provide names and dates for any air deviations
 - Meet all airline deadlines indicated on air confirmation:
 - Pay airline deposit by due date.
 - Notify World Travel of any reduction of the number of passengers by utilization lock-in date.
 - Pay balance to airline by final payment deadline.
 - Provide passenger list with complete information by "names due" deadline
 - [Request a Passenger List Template](#)
 - Gather passenger information well before "names due" deadline.
 - As soon as you identify passengers and passport origins, determine if visa will be needed.
 - Start the visa application process for all travelers who require them.
 - [Check visa requirements with Visa Central/CIBT](#)
 - Reach out to University Health Services for pre-travel advice on immunizations and medical considerations specific to your destination.
 - [Schedule an appointment with UHS](#)
 - Schedule group planning meeting with Susan, faculty (for course travel), group leader, and trip planner.
 - [Download helpful information for group planning meeting](#)
- At the group planning meeting, Susan will assist with the following:
- Determine accommodation needs
 - Determine transportation needs (domestic and international)
 - Determine if a DMC (Destination Management Company) or tour operator is needed
 - Develop a meal plan - group meals, reservations, box lunches

- Plan any special events during the trip and secure venues
- Discuss tours, guides, guest lecturers, tickets

TIP: One of the main goals of the planning meeting is to create a framework for the day-to-day itinerary. This is essential in order to move forward with booking the necessary travel services.

- Develop a day-to-day itinerary
- Review day-to-day itinerary with Susan for any service gaps
- Susan will source hotels and any travel service providers
- Select hotels
- World Travel will book and confirm hotels and provide contract and payment deadlines
- Susan will negotiate contracts with travel service providers
- If there are new suppliers that are unable to be paid with your T&E card, begin the onboarding process to ensure you meet contract payment deadlines.
- World Travel will book domestic transportation
- When you have all of the following: names, passenger info, air under contract, confirmed hotels, and a confirmed itinerary, register your group in Concur.

[How to register group travel](#)

- Notify all travelers in the group to submit individual travel requests.

IMPORTANT: It is imperative that every student who is traveling internationally register in Concur. The group leader or administrator needs to register the group in Concur along with all travelers' names. When the group has been registered, each traveler will receive an email stating that their travel profile has been created and that they need to complete the profile with the necessary info as soon as possible.

The Travel Oversight Group will be notified if necessary. Kara Amoratis, the University's associate director of international travel safety and security, will reach out to you if your destination has a risk rating of High or above. You can also contact Kara for a security briefing at amoratis@princeton.edu.

IMPORTANT: Students planning to travel to locations abroad with an International SOS risk rating of High or Extreme must participate in a travel review process overseen by the Travel Oversight Group (TOG) and obtain safety guidance prior to departure. Students should complete and submit an application for additional review by the TOG in the Global Programs System (GPS). As part of this application, student will submit an Addendum to the Travel Terms and Conditions signed by them and a parent/guardian. Any questions about the travel request process should be directed to tog@princeton.edu.

- Encourage faculty and staff to register their traveler information in Concur as well.
- 30 days prior to travel: Ensure that all students have complete their travel profile in Concur or follow up with them requesting this be done.
- Familiarize yourself and your travelers with International Health Coverage and International SOS resources

[Detailed information on International health coverage and International SOS](#)

- Pay all suppliers by deadlines indicated on contracts.
- Submit rooming list for each hotel to World Travel
- Receive airline confirmation from World Travel and distribute copies to each traveler.

TIP: Some trip planners create a Participant Packets for all travelers, that includes the itinerary, contact numbers, International SOS cards, and other important info. For a sample packet, contact Susan Godfrey at sgodfrey@princeton.edu or x7316.