



PRINCETON  
UNIVERSITY

# 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 from Stephanie Shores or discuss transportation needs with Susan
  - If needed, obtain budget estimate for entire trip/program from Susan
  - Submit a request 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 or Stephanie 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 with Global Safety & Security, using the "Enroll My Trip" tool.  
[How to register group travel](#)
- Familiarize yourself and your travelers with health coverage and emergency assistance services  
[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](mailto:sgodfrey@princeton.edu) or x7316.