



Before the Approval Meeting

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YOUR TRAVEL COMPANY



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01

School Approval

Your district's requirements come first.
Confirm the process before opening
registration or making commitments.



Who approves the trip and who signs agreements



Required forms, supporting documents, and submission deadlines



Board meeting dates and purchasing or vendor requirements



Approval needed before promotion, fundraising, or deposits



Identify the decision and commitments approval would authorize



Your preparation

- Separate initial approval items from departure requirements
- List outstanding answers and when you expect them

Be ready to answer: What commitments would follow approval?



Educational Purpose

Connect the experience to what your students are learning. Ask your company for itinerary details you can use.

- Destination, dates, grade levels, and estimated participation
- Learning goals and connections to classroom instruction
- Instructional days missed and plans for missed work
- Activities or assignments before and after the trip
- A proposed daily itinerary with activities and travel time
- Educational information about planned attractions
- A clear distinction between confirmed and tentative plans

Be ready to answer: What will students gain from this experience?



Company Experience

Gather enough information to explain why you feel comfortable recommending the provider.

- Legal company name, ownership, location, and school travel experience
- Experience with your destination, age group, and group size
- Primary planning contact and a backup contact
- Services handled directly and services subcontracted
- Ask for nearby schools or schools with similar trips
- Request contacts who have agreed to speak with teachers
- Ask about final cost, problem resolution, and repeat bookings

Be ready to answer: What have you checked beyond the proposal?

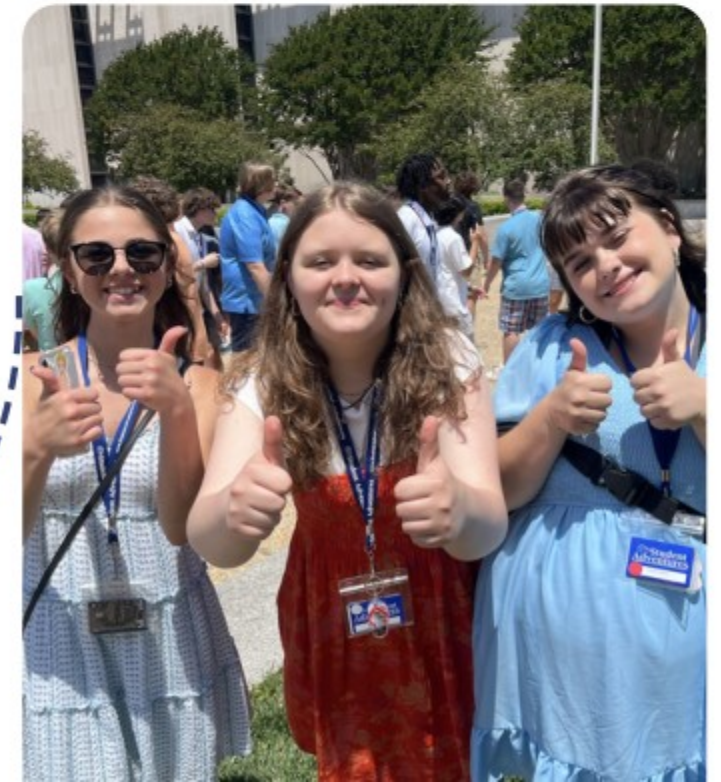


Safety & Emergency Response

Request written procedures that explain how your travel company and school staff respond together.

- The 24/7 emergency number and who answers it
- When the tour director joins and leaves the group
- Procedures for a missing student, illness, or injury
- Plans for severe weather, closures, and travel disruptions
- Who accompanies a student for medical care
- Who supervises the remaining group and contacts families
- Who authorizes changes or extra costs and documents incidents

Be ready to answer: Who takes action during an emergency?



Student Supervision

Make sure teachers, chaperones, and company staff understand their responsibilities throughout the trip.

Clarify with your company

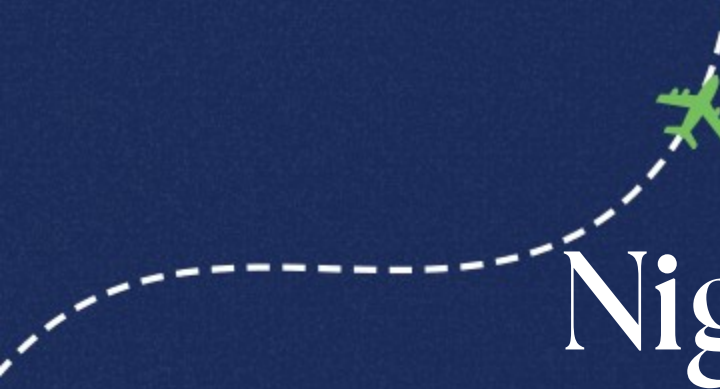
- The responsibilities of the tour director and school staff
- Headcounts, buddy systems, free time, and check-ins
- Supervision during rest stops, crowded sites, and public transit



Confirm with your school

- Required supervision ratio and proposed chaperone count
- Adult screening and chaperone orientation requirements
- Student conduct, discipline, and visitor expectations
- Early return procedures and costs for sending a student home

Be ready to answer: Who supervises students at each stage of the day?



Nighttime Security

Ask what the service actually includes. A general promise of nighttime security leaves important details open.

Request a written description

- Security provider, screening, training, and applicable credentials
- Exact coverage hours and number of security personnel
- Whether personnel work exclusively with your group
- Coverage across multiple floors or buildings

How guards contact teachers and report incidents

Responses to students leaving rooms or unauthorized visitors

Backup plans for an absent guard and duties outside coverage hours

Who is responsible before and after security's shift?



Insurance & Agreements

Ask your district's business office which documents it needs to review before anyone signs an agreement.



Company Coverage

- Current liability certificate
- Coverage types, limits, and trip dates



District Review

- Requested endorsements and documentation
- Subcontractor insurance



Booking Agreements

- School agreement and family booking terms
- School responsibilities and costs



Participant Coverage

- Medical and accident coverage
- Separate documents for each protection type

Be ready to answer: Has the appropriate district staff reviewed the documents?

Identify the actual operator and ask how your company evaluates its transportation partners.



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Motor Coach Transportation

- ✓ Operator name, USDOT number, and current insurance certificate
- ✓ How the company checks safety history and driver qualifications
- ✓ Vehicle capacity, seat belts, luggage space, and accessibility
- ✓ How the schedule accounts for driver rest and relief drivers
- ✓ Breakdown and replacement plans, subcontracting rules, and notice of a new carrier

Be ready to answer: Who is transporting students and how were they evaluated?



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Hotels & Other Travel

Gather the proposed arrangements and understand how the company handles substitutions.

Check other transportation

- Flights, airport transfers, local transit, or boats in the itinerary
- Airline seating, baggage costs, group terms, and disruption plans
- Which bookings are tentative and how substitutions are communicated



Hotel name, location, and daily travel time



Students per room and actual bed arrangements



Chaperone rooms and student room grouping



Accessibility, pool rules, curfew, and damage charges

Be ready to answer: What happens if the proposed arrangements change?





Full Trip Cost

Request a written breakdown that explains what families will pay and what could change that amount.

Request the full price details



- Everything included and excluded from the quoted price
- Tips, meals, baggage, admissions, and optional purchases
- Card, installment, registration, and late payment fees
- Quote expiration, price guarantees, and possible surcharges

Identify all commitments

- Deposit amount, payment schedule, and final payment deadline
- Recommended spending money and any meal allowance gaps
- School costs, including substitutes, extra staff, or unpaid balances

Be ready to answer: What will families realistically pay?



Enrollment Requirements

A quoted price depends on participation assumptions. Understand those before families register.



Confirm the pricing assumptions

- Minimum paying participants and the date counts become binding
- Number of buses, room occupancy, and complimentary adults
- Price changes if fewer students sign up
- Effects of adding or removing a bus or chaperone spots



Ask about a shortfall

- Options to reduce costs and who approves itinerary changes
- Whether the school must pay any remaining shortfall
- Cancellation terms if the minimum count is never reached

Be ready to answer: Under what circumstances could the school owe money?

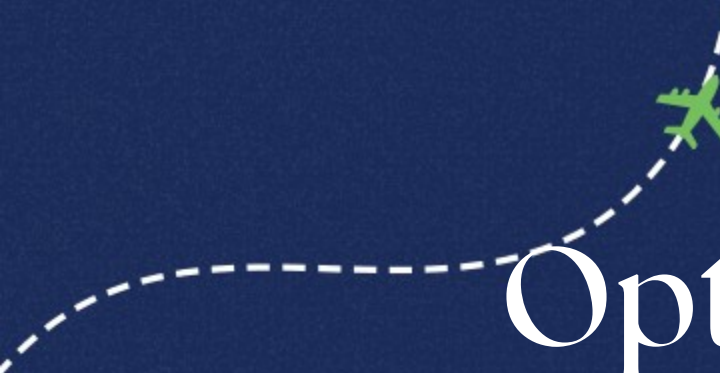
Cancellation & Refunds

Request written terms for an individual withdrawal and for cancellation of the entire group.

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- Cancellation deadlines and nonrefundable amounts
 - Terms if approval or minimum enrollment falls through
 - Rules if the school, company, or supplier cancels
 - Postponements, interruptions, and major itinerary changes
 - Refunds as money, credits, or a combination
 - Refund request process and expected timing
 - Replacement travelers, name changes, and transfers



Be ready to answer: What money could families lose if plans change?



Optional Trip Protection

Keep participant protection separate from the travel company's liability insurance and motor coach insurance.

Request the protection terms

- Whether the product is insurance or a company cancellation waiver
- Cost, purchase deadline, and eligibility requirements
- Covered circumstances and important exclusions
- How much it reimburses and any nonrefundable charges

Who handles requests and makes coverage decisions

Required documentation and deadlines for submitting a claim

How families receive the complete terms before purchasing

What does the protection cover and what does it exclude?

Fundraising & Affordability

Develop a realistic plan for helping families afford the trip and handling the money raised.

Plan with your school and ask your company about available support.

Information to gather



Fundraising goals, timeline, and required district approvals



Who manages funds and whether proceeds support individuals or the group



A private process for families to request financial assistance

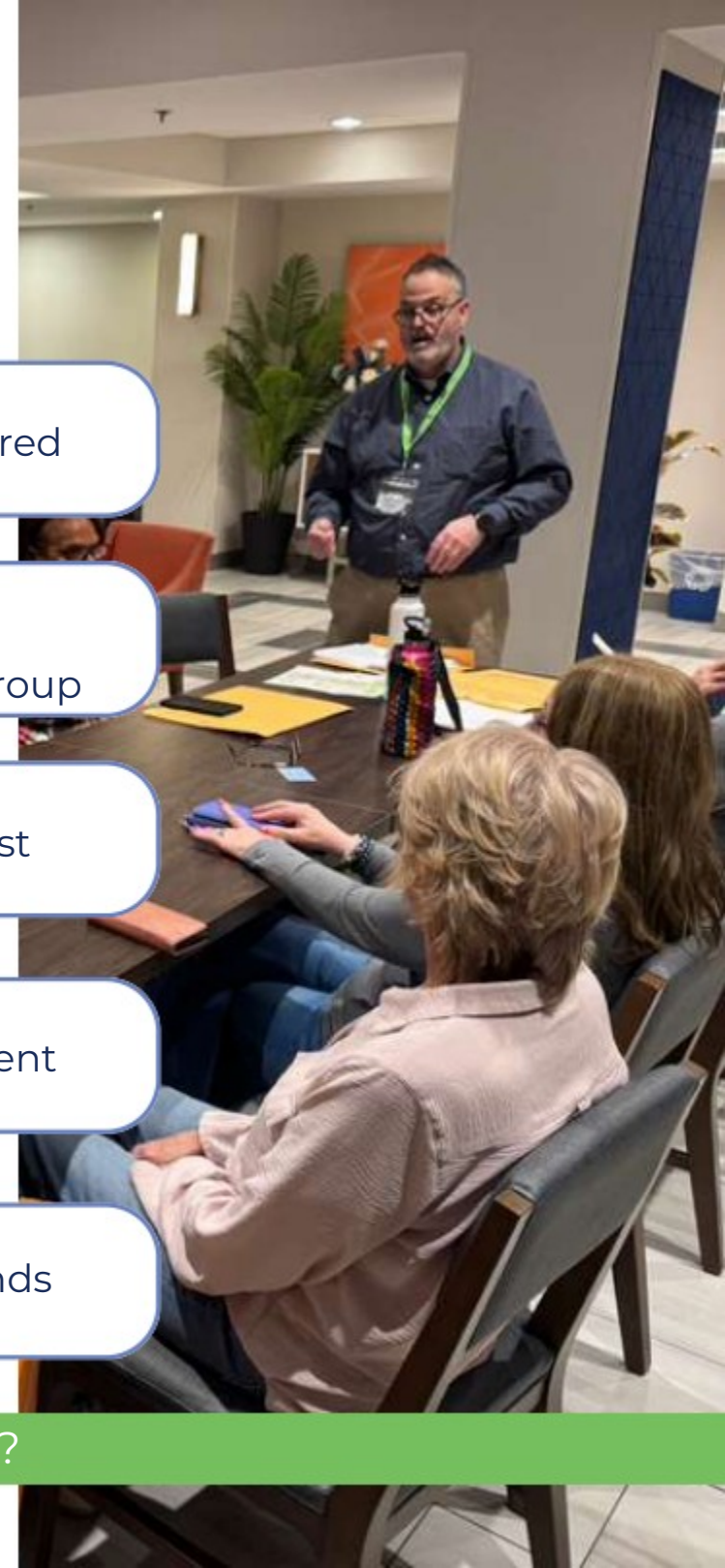


Fundraising tools, scholarships, payment plans, expenses, and fees



Treatment of unused donations or funds after a student cancels

What happens if fundraising falls short?



Coordinate with appropriate school staff so participating students' needs are part of the plan.



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Student Needs & Accommodations

- ☒ Medical forms, emergency contacts, and medication responsibilities
- ☒ Medical staffing and alternatives for students who do not attend
- ☒ Accessible transportation, hotel rooms, restrooms, and activities
- ☒ Walking demands, food allergies, and dietary accommodations
- ☒ Any added costs and secure sharing of necessary medical information

Be ready to answer: How will participating students' needs be addressed?



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Family Information

Prepare clear information so families understand the experience, costs, expectations, and next steps.

Also confirm

- What student information the company collects and shares
- Who can access data, retention practices, and photo consent



Itinerary, prices, and registration terms



Permission forms, conduct, and packing



Parent meeting materials and support



Payment dates, contacts, and trip updates



Translation and offline access options

Be ready to answer: How will families receive clear and timely information?

The Meeting Checklist

Organize the documents your district requests. Label tentative plans and track open questions.

- District forms and educational goals
- Itinerary and transportation details
- Price, payment, and enrollment terms
- Safety and supervision procedures
- Insurance documents and agreements
- Cancellation and protection terms
- References and family communication
- Fundraising and student support plans

Ready for the approval meeting

Use this guide with any travel provider.
Your district's requirements come first.

