

## Team Leader Checklist

Use this checklist to assist in planning the mission trip. This checklist is ONLY a tool to help the leader in preparation for the trip. **[EXCEPTION: items #7 and #9 must be completed.]**

- \_\_\_ 1. Meet with the Senior Pastor and Mission Team Chairperson for support as needed.
- \_\_\_ 2. Identify skills needed for the mission trip.
- \_\_\_ 3. Discuss information that will help prepare for the trip and make it a success.
- \_\_\_ 4. Create a trip participant form that includes areas such as:
  - Personal faith journey and talents/abilities of the participant. Include any limitations.
  - How the participant will be expected to fund their portion of the trip. (If applicable.)
  - Deposit and trip fee amounts and deadlines.
- \_\_\_ 5. Create team formation opportunities. Encourage the team to be a part of planning.
- \_\_\_ 6. Create a plan to provide cross-cultural training for team as needed.
- \_\_\_ **7. Establish a funding plan for trip and project funds following church financial procedures.**
  - Create a calendar that includes deadlines for deposits. Include deadlines for payments to those providing transportation, lodging, insurance etc.
  - All trip funds must be collected and accounted for by the team leader or a designee of the leader.
  - Funds collected must be deposited into a designated fund established with the Church treasurer.
  - Establish fund raising plan if needed. Specify how each participant will help in raising funds.
  - Communicate what will happen to the deposit and trip fee funds the participant has paid/raised if participant decides not to participate in the mission trip.
  - Communicate what will happen to the deposit and fee funds the participant has paid/raised if mission trip is postponed or cancelled.
  - Plan for what will happen to mission trip funds if trip is cancelled.
  - Plan for disposition any remaining funds after the trip, if applicable.
  - Consider trip cancellation insurance depending on location of mission trip.
  - After the trip, share a simple balance sheet with the Senior Pastor detailing income raised, expenses and any balance or deficit.
- \_\_\_ 8. Discuss how our congregation can provide spiritual, material, or other support for the trip.
- \_\_\_ **9. Obtain emergency contact information for each participant and provide a copy of this information to the lead pastor and office administrator.**
- \_\_\_ 10. Meet with the trip participants after the trip has been completed to continue team bonding.
- \_\_\_ 11. Meet with the Mission Team, Senior Pastor, and other interested individuals to discuss the trip.
- \_\_\_ 12. Consider making a trip summary presentation to the congregation (with pastoral approval.)

**Additional International checklist items:**

- \_\_\_ 1. Identify immunizations needed for the trip and ensure each member has the immunizations.
- \_\_\_ 2. Ensure everyone has required documents (i.e., passports, visas, medical cards, immunizations).
- \_\_\_ 3. Ensure that all participants have necessary health and liability insurance for international travel.
- \_\_\_ 4. Investigate travel information, restrictions at a site such as <https://travel.state.gov/>

(Revised 01/2022)