

## **Team Leader Checklist Planning and Preparing for the Mission**

### **Pre-Planning: (One year or more before departure)**

- \_\_\_ Gather persons interested in organizing an UMVIM team. They may be from one local church, several churches, a district or a conference. Select a convener and a recording secretary to take minutes.
- \_\_\_ Decide what kind of mission team to organize. Will you include youth and adults? What kind of project is it: Construction, medical, evangelistic, Bible School, a combination?
- \_\_\_ Seek the endorsement of your local church Administrative Board, District Office, and Conference UMVIM coordinator.
- \_\_\_ Select a team leader.
- \_\_\_ Select your location. Choose first, second, and third preferences. Contact conference, jurisdictional, or Mission Volunteers office for Project Lists.
- \_\_\_ Decide whether you will raise money to pay any personal expenses of any team members. Volunteers pay their own expenses as a rule, but selective assistance can be useful.
- \_\_\_ Appoint someone to lead fund raising activities. Select ways to raise money for the project.
- \_\_\_ Choose a coordinator to handle all travel arrangements.
- \_\_\_ Name a publicity coordinator to publicize the project. Decide how to inform and involve the local church(es), the District, the Conference in the project from beginning to end.
- \_\_\_ Set a tentative date for the trip (to be confirmed with host).
- \_\_\_ Decide how to recruit team members.
- \_\_\_ Write to the contact persons for more information about projects that interest you, or work through your UMVIM Coordinator to make these contacts.
- \_\_\_ Narrow the field of project choices.
- \_\_\_ Make final decisions about your project (type, location, cost, etc.). If possible, send the team leader for an on-site inspection. Keep your Conference and Jurisdictional UMVIM Coordinators informed. Follow normal procedures in your Jurisdiction. Let your Coordinators know if you will accept team members from outside your own area. (Such persons often call Coordinators to find a suitable project for themselves.)
- \_\_\_ Set a goal for the money you will raise to pay for materials and supplies for the project (not personal expenses of the team).
- \_\_\_ Check on insurance coverage provided by your local church or conference. Strongly consider the accident/accidental death and emergency evacuation insurance provided by the General Board of Global Ministries or by your Jurisdictional UMVIM office.

### **International Projects Only**

- \_\_\_ Contact a travel agent. Find out if you will need passports and/or visas.
- \_\_\_ Check the Centers for Disease Control (CDC) website at: <http://wwwnc.cdc.gov/travel/> regarding required/recommended inoculations.
- \_\_\_ Contact the VIM Coordinator in the country you will visit. Ask about any credentials and documents you need to send in advance. (Medical teams need clearance from the local government to practice medicine.)
- \_\_\_ Research customs regulations, especially about supplies you will take with you.
- \_\_\_ Decide how to handle your money. If your project is an Advance Special, your local church may route your money through the General Board of Global Ministries. If your project is not an Advance Special, you possibly can get an Advance Special number assigned to it. Contact your UMVIM Coordinator about this.

**Planning:** (9-12 months before departure)

1. Select Project And Team Activities

- Contact project hosts
- Receive formal letter of invitation
- Arrange details of mission stay with host
- Determine type of project and cost of supplies (see project profile)
- Make team arrangements/complete Covenant for Mission Partnership
- Arrange housing
- Arrange meals (prepared by host or team)
- Arrange transportation
- Determine maximum number of team members the host can accommodate
- Determine need for interpreter
- Arrange for team orientation by host
- Confirm with host joint worship opportunities
- Research cultural information
- Arrange for site-seeing
- Establish best form of communication with host (phone, fax, email). Keeping costs for host in mind.
- Have clear understanding of host expectations
- Discuss and agree upon transmittal of project funds (means, timing, accountability)

2. Make Travel Arrangements

- Transportation details and tentative airline schedule and reservations confirmed in writing
- Non-personal luggage transportation details
- Lodging/meals while traveling to site
- Travel agent information: \_\_\_\_\_

3. Gather Health And Safety Information

- Emergency numbers
  - Medical facilities
  - Host
  - US Embassy
  - UMVIM Office - Conference, Jurisdictional
- First Aid Kit needs
- Appropriate immunizations/medications needed
- Work-site safety
- Other safety and security precautions

4. Develop Time-Line

- Departure and return dates
- Deadline for forms and money to be turned in to team leader
- Deadline for team leader to turn in money to appropriate treasurer (church, conference); travel agent, project host, etc.
- Dates for team orientation and training
- Date for UMVIM team Sending Forth
- Possible dates for UMVIM Team reunion

## 5. Prepare Budget

- \_\_\_ See “Budgeting” under “Team Leader Responsibilities” in this Manual for suggested budget items
- \_\_\_ Determine other costs:
  - \_\_\_ Miscellaneous costs - bottled water, farewell fellowship meals/celebrations with hosts
  - \_\_\_ Team First Aid Kit
  - \_\_\_ Receipt book for trip

## 6. Recruit and Select Team

- \_\_\_ See “Recruiting Team Members” in the “Team Leader Responsibilities” section of this Manual
- \_\_\_ Include interpreter(s) if needed
- \_\_\_ Consider offering scholarships
- \_\_\_ Keep size of team to hosts’ request (10-14 is generally acceptable)
- \_\_\_ Confirm receipt of applications
- \_\_\_ Distribute and discuss forms to team members-team member information; covenant; liability; insurance; medical information and release; notification of death; parental permission for minors; and any others required by Conference or Jurisdictional UMVIM.
- \_\_\_ Announce deadlines for turning in money.

### **Team Leader Preparation** (3-6 months before departure)

## 7. Travel Essentials

- \_\_\_ Obtain passports, visas, and work permits where needed.
- \_\_\_ Collect money for airfares and purchase tickets.
- \_\_\_ Send list of team members to travel agent (with names as they appear on passports).
- \_\_\_ Verify professional credentials for serving in host country (health-care volunteers).
- \_\_\_ Know information about medical system in country of travel.
- \_\_\_ Have evacuation plans in case of severe weather, social upheaval, medical emergency, etc.

## 8. Prepare To Train The Team

- \_\_\_ Schedule orientation and training (meetings, conference calls, mail, video sessions).
- \_\_\_ Prepare or assign devotionals for orientation and training sessions.
- \_\_\_ Prepare training packet with mission information:
  - \_\_\_ Purpose of UMVIM
  - \_\_\_ Project information (place, personnel, work to be done, weather, housing, food, etc.)
  - \_\_\_ Mission Policy Agreement and other forms
  - \_\_\_ Tentative itinerary for the mission (daily schedule)
  - \_\_\_ Accidental/medical insurance information for team members
  - \_\_\_ List of team member responsibilities to the team and hosts, sign-up lists (devotions, work assignments, etc.)
  - \_\_\_ Emergency and contact numbers
  - \_\_\_ Packing lists -see “Team Member Packing List” under “Forms for Team Members”
  - \_\_\_ Health and safety information - **Be certain to stress any dangers and possible problems or concerns that might arise so that team members fully understand prior to going.** This is critical for you as team leader.
  - \_\_\_ Currency information

- Cultural information
- Sight-seeing information
- Team assignments - job descriptions (see “Suggested Team Member Assignments” in the Appendix of this manual)
- Plan team building exercises for training session (see “Ice-Breakers” in the Appendix of this Manual)
- Plan UMVIM team Sending Forth Service

**Preparing The Team (1-2 months before departure)**

9. Team Orientation and Training Meetings

- See “Topics for Team Orientation and Training” and related materials in the Appendix of this Manual
- Have team members choose work assignments (or delegate assignments based on knowledge of their skills).

10. Collect Documents And Money From Team Members

- Have forms signed, witnessed and notarized as indicated.
- Make copies of picture page of passports for international teams.
- Have medical information forms checked by leader and precautions discussed with team members.
- Send forms to appropriate UMVIM office (Conference and/or Jurisdiction).
- Send team roster with family contact numbers to Conference UMVIM Coordinator and/or Jurisdiction).
- Receive devotions sign-up list from spiritual guide.
- Collect any remaining money due from team members.

11. Verify All Arrangements

- Travel
- Lodging
- Food and drinking water
- Ground transportation
- On-site work information (tools or supplies to bring from home, or money to purchase them)
- Daily schedule
- Request receipts for monies spent (carry receipt book to use if needed)
- Advance Special number for the project (so team members can continue to support the project financially)
- Ordering of needed supplies as needed (medical, Bible School, etc.)
- Team roster sent to US Embassy in host country, including passport numbers (see <http://www.tyzo.com/planning/embassies.htm> for locations of embassies.)
- Team roster sent to US Representative, including passport numbers
- Health needs of team members and persons to contact in case of emergency recorded

12. Involve Sending/Sponsoring Congregation In The Mission

- Educate congregation(s) about the mission project.
- Ask for prayerful support of the team during the mission.
- Raise funds.
- Prepare to share the story after the team returns.

### **Finalize Mission Plans (2-3 weeks before departure)**

#### 13. Finalize Travel Plans

- \_\_\_ Reconfirm airline reservations.
- \_\_\_ Notify travel agent immediately if there is a cancellation.
- \_\_\_ Check tickets for correct names, times, points of departure and arrival.
- \_\_\_ Verify insurance coverage (see Accident Insurance Application in the Forms for Team Members section of this Manual).
- \_\_\_ Look into passports, visas, immigration, and customs requirements.
- \_\_\_ Confirm plans with host contact:
- \_\_\_ Make travel and meeting arrangements with host
- \_\_\_ Verify work project and housing details (money sent or brought for project supplies, food, lodging)
- \_\_\_ Make currency exchange plans
- \_\_\_ Obtain or verify phone numbers of local contacts, officials, etc. Give copies to team members and conference UMVIM Coordinator.
- \_\_\_ Ask what amount is customary when tipping luggage handlers, waiters, etc.
- \_\_\_ Have a Sending Forth Service for the team.

### **Travel To Project Location: (Pre-departure and departure day)**

- \_\_\_ On pre-departure day, pack as much as possible in the same size boxes or in old suitcases. Label and keep a copy of numbered boxes/suitcases and their contents. This list is most helpful at customs.
- \_\_\_ On departure day, meet at a church or other appointed meeting place early enough to load luggage and boxes, say goodbye, take pictures, get last minute instructions, and ask God's blessing on the mission.

### **After Your Return: (2-3 weeks after returning)**

- \_\_\_ Send letters of appreciation to team and to hosts (include some photographs for hosts).
- \_\_\_ Hold debriefing and evaluation meeting. Include time for sharing journal, photos, video.
- \_\_\_ Complete plans for your presentation to your congregations(s), district, etc.
- \_\_\_ Assemble items you will need for keeping permanent records of your mission trip.
- \_\_\_ Arrange for publicity about the trip in local newspapers, church publications, TV, radio, web site.
- \_\_\_ Send final reports to appropriate UMVIM Coordinator.
- \_\_\_ Suggest readings and resources for dealing with reactions to third world culture and problems.