

Pre-Trip Orientation Checklist

Objective: To identify and discuss any potential issues prior to domestic travel in order to establish realistic expectations and a smooth transition to the field environment for all involved with the trip. For international and University requirements visit the [UM Global Website](#).

Tip: To use this document, click **File > Make a Copy** and save to your Drive.

Logistics and itinerary

Accommodations and transportation

Clothing, gear, and other materials that should be packed

- Items that should not be packed
- Items are available or unavailable for purchase for the duration of the trip

Field location conditions

Field site rules and expectations of conduct during travel

Rules for “off” hours

Pre-departure errands

- University deadlines and communications
- Personal financial arrangements (taxes, bill pay, notification of travel, etc.)
- Recommended academic preparation

Money

- Source (university credit line, personal credit line, cash, traveler's checks, etc.)
- Identification of ATM and banking availability
- Credit card use/availability
- Payment/per diem for hired staff

Passport and visa requirements (for international students)

How to avoid and manage potential travel mishaps (cancelled flight, missing bags, etc.) ☐ Situations that may contribute to culture shock

Major cultural customs

- Nonverbal behavior (eye contact, gestures, touching, personal space, etc.)
- Dress
- Concerns regarding gender, ethnicity, religion, sexual orientation, and disabilities
- Food/drink rituals
- Taboo subjects/behavior
- Tactics to avoid cultural misunderstandings

Local laws

- Departures from U.S. law (e.g., gun permits, alcohol purchases.)
- Means of reporting emergencies
- Documentation restrictions (e.g., Will researchers need to have permits/identification at all times?)
- Driving rules and requirements

If foreign language is a concern, common phrases researchers should know