



# Open team leader checklist

Checklist of action items	Who is responsible?	Completed?
<b>Today</b>		
Review your confirmation materials.	Team leader	
<b>Within two weeks</b>		
Complete your confirmation webinar.	Team leader	
<b>Within three weeks</b>		
Create a personal Share.Habitat fundraising page.	Team leader	
Post web flyer (flyer will be published publicly or privately, depending on the dates of travel).	Global Village	
<b>Three to 12 months before the trip</b>		
Send volunteer applications to team leader. (As soon as we have applications, we'll start forwarding them along to you.)	Global Village	
Begin expectation-setting calls with your potential volunteers.	Team leader	
Customize the standard invitation letter and send it to volunteers.	Team leader	
Two to six months before you travel, send out a series of newsletters to your volunteers or set up in-person meetings.	Team leader	
Two to four months before you travel, begin communicating with your host coordinator regarding your upcoming trip.	Team leader	
<b>Two months before the trip</b>		
Send reminder of final payments to team members.	Team leader	
If needed, send invitation letters/supporting documentation for visa.	Global Village	
<b>45 days before the trip</b>		
Final payments are due from each team volunteer.	Team leader	
<b>14 days before the trip</b>		
Send emergency contact information to team members.	Team leader	
Send travel advance and financial details to team leader.	Global Village	
Final call with trip engagement specialist.	Global Village	
<b>Global Village trip!</b>		
<b>Within 30 days after the trip</b>		
Expense report due 14 days after the end of the trip.	Team leader	
Schedule debrief call.	Global Village	
Send team evaluations to team leader.	Global Village	
<b>60 days after the trip</b>		
Trip fundraising closes.	Global Village	

*Start planning for the next trip!*



## Team leader resources

We have highlighted a few key resources for you below. Be sure to check our [Team Leader Resource Page](#) for more.

### Pretrip

<a href="#">Open Team Invitation Letter Template</a>	Editable invitation letter for open teams.
<a href="#">Closed Team Invitation Letter Template</a>	Editable invitation letter for closed teams.
<a href="#">Closed Team Registration Link</a>	Link to register your team for closed team trips. (The entire team must register.)
<a href="#">Recruitment Flyer</a>	Editable PDF to promote your trip.
<a href="#">Share.Habitat</a>	Website to set up your Share.Habitat page.
<a href="#">Expectations Call Questions</a>	Great questions to ask during the expectation-setting call.
<a href="#">GV Payment Policies</a>	HFHI payment procedures and policies.
<a href="#">Team Report Portal</a>	Portal to view team roster and income reports.
<a href="#">Fundraising Letter</a>	Instructions to send team members to register for the Share.Habitat page.
<a href="#">Cancellations</a>	Policies regarding changing or canceling a trip.

### During the trip

<a href="#">Reflection Meetings</a>	Guide for meaningful reflection meetings.
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### Supporting links

<a href="#">Frequently Asked Questions</a>	Answers to frequently asked questions about Habitat and Global Village.
<a href="#">Team Leader Resource Page</a>	Web page with additional team leader resources, including training slides and the team leader manual.

### Forms and documents

<a href="#">Insurance Coverage Summary</a>	Understanding the HFHI Medical Insurance Coverage Policy.
<a href="#">Roster tool</a>	Excel file with team roster, flight itineraries and room requests.