



# open team leader checklist

Enter the date your trip was confirmed and when it starts. Key due dates automatically calculate and you can add in the date you complete tasks.

Date confirmed:	Trip start date:	Link to team leader resources	
Action items:	Completed by:	✓	Date due/done:
<b>Day of confirmation</b>			
Review your confirmation materials- <i>email with budget, itinerary, handbook, etc.</i>	Team leader		
<b>Within two weeks of confirmation</b>			
Complete your <b>confirmation webinar</b> .	Team leader		
<b>Within three weeks of confirmation</b>			
Create a personal <b>Share.Habitat</b> fundraising page.	Team leader		
Post web flyer to <a href="http://habitat.org/gv">habitat.org/gv</a> - <i>within a week of completing confirmation webinar</i> .	Global Village		
<b>Three to 12 months before trip</b>			
Send volunteer applications to team leader- <i>processing time is two days</i> .	Global Village		ongoing
Ask Engagement Specialist to temporarily remove flyer if too many inquiries.	Team leader		as needed
Respond to interested volunteers and set <b>expectation-setting calls</b> .	Team leader		ongoing
Customize the <b>standard invitation email message</b> and send it to volunteers.	Team leader		ongoing
Send a series of newsletters to your volunteers.	Team leader		
<ul style="list-style-type: none"> <li>Newsletter 1</li> <li>Newsletter 2</li> <li>Newsletter 3</li> </ul>			
Check your online <b>roster and income reports</b> .	Team leader		ongoing
Begin communicating with your host coordinator and finalizing trip details.	Team leader		
Recruit your final team member! Ask Engagement Specialist to deactivate webflyer.	Team leader		
<b>Two months before trip</b>			
Send reminder of final fundraising push/program donation due to team members.	Team leader		
If needed, send invitation letters/supporting documentation for visa.	Global Village		as needed
<b>45-30 days before trip</b>			
Final payments are due from each team volunteer.	Volunteers		
Finalize <b>roster tool</b> and email it to Engagement Specialist and host coordinator.	Team leader		
<b>14 days before trip</b>			
Send emergency contact information sheet and last minute details to team members.	Team leader		
Initiate travel advance and send financial details to team leader.	Global Village		
Final call with Engagement Specialist.	Global Village		
<b>Your trip is here! Safe travels!</b>			
<b>Once you return</b>			
Submit your expense report.	Team leader		
Schedule debrief call.	Global Village		
Receive evaluation results.	Global Village		
Send a follow up message to your team.	Team leader		