

# FY25 GI Regional Travel for Global Teams

Planning Process + Procedure

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## **Purpose**

To better coordinate regional travel across Global teams in FY25, Global Impact is implementing a new regional travel approval process to ensure regional staff availability and capacity to host visits

## **Procedure Highlights**

All travel to regions must be coordinated with Global Impact prior to planning and must be approved by the Regional Directors.

Any conflicts between the region and the travel team that cannot be resolved with the Regional Director will be escalated to the Chief Impact Officer for resolution.

# Responsibilities of traveling team

1. Consult the [GI Department Calendar](#) to determine if country/region has holidays or existing events already planned, including travel by other teams.
2. [Use this form to submit](#) the following to Andrea Shores:
  - Planned/preferred quarter of travel with specific dates if possible
  - Planned/preferred region/country
  - Travel team point of contact, department(s) involved and number of attendees traveling for event
  - Expected regional level of effort (see planning best practices slide) – what support are you requesting from regional team?
3. Be flexible in your travel dates and look for opportunities to combine your trip with another team to minimize the burden on regional teams.
4. Work with the regional points of contact assigned by the Regional Director (do not reach out to other staff on the team with requests without approval from the Regional Director).

# Approval process

1. **Request** | Andrea Shores will review the [request](#) and submit it to the relevant Regional Director within 5 business days of receiving complete information.
2. **Approval** | Regional Director will approve, decline, or come back with questions or suggested changes within 5 business days.
3. **Planning** | Once a trip is approved by the Regional Director, planning may begin. The Regional Director will assign a point of contact for the traveling team to coordinate the trip. Andrea will add the trip to the GI calendar.

# Planning best practices

Avoid dates that fall during country holidays

Look for opportunities to coordinate your trip with other potential trips/events happening at the same time

Once your trip is approved, go through the Regional Director for requests related to your trip unless, or until, they assign someone on their team to work with you

Make sure the traveling team has the capacity/resources to handle the following yourself:

- Booking flights, accommodations, and meeting venues
  - Your regional point of contact (as assigned by the Regional Director) can make recommendations on hotels, meeting venues, in-country transportation, activities, etc. They will also help plan any partner and/or household visits required.
- Securing required visas or other travel documents
  - Your regional point of contact can help with invitation letters, if required.
- Developing your trip agenda and sharing it with the regional team at least 6 weeks in advance of your trip

# Limitations

## **Regional teams will not be expected to do the following:**

- Book flights, accommodations, local transportation, and meeting venues
- Secure required visas or other necessary travel documents
- Develop your trip agenda

**The Regional Director has the sole discretion to determine what level of support their regional team will be able to provide.**



# Thank you!

Andrea Shores

Impact Operations

[ashores@water.org](mailto:ashores@water.org)

