



Domestic Travel Check List

Include a copy of this completed checklist in Paul's final itinerary packet
Be sure to complete all blanks with a checkmark or an N/A - (incl. a completed copy with Paul's travel docs)

***NOTE* TURN WATER OFF**

Signature: _____ Travel Dates: _____

CHARGES

_____ Be sure and determine with Paul whether the travel costs (flight, hotel, rental car, etc.) should be charged personally, to the ranch, ministry travel for Servant's Heart, or investment travel for PK Partners. Note: Some travel may have two purposes that need to be split. Have Paul confirm upfront prior to booking how the travel expense should be charged.

_____ %	Personal	_____ %	NFR
_____ %	Servant's Heart	_____ %	PK Partners

TRAVEL AGENT

_____ Use Joy, our travel agent, for any complicated airline bookings or international flights. Simple airline reservations we should make ourselves directly.

_____ When booking flights on Delta, ask Joy to quote both fare prices (domestic versus international) 1 way.

AIRLINE TRAVEL

Miles

_____ Always check with Paul to see if he wants to try to use miles for travel over a few hundred dollars.

Seat Assignments

_____ When seats can not be pre-assigned for some reason, determine the best alternative regarding when the seats can be assigned and be sure to inform Paul. If they can be assigned sometime prior to traveling via the internet develop a game plan for both departure and return flights. Mark calendar and get seat assignments at the earliest possible time. However, if they can only be assigned at the airport make sure Paul knows that an earlier check in is important for seat assignment.

~ Paul and Kathy traveling together ~

Plane Configuration

_____ Prefer the two-seat side when possible – Kathy on window, Paul on aisle. If it is a three-seat side, give Paul the aisle and Kathy the window with the seat in between left open. If that seat gets filled, then we trade the aisle for the center seat. Kathy always prefers to sit by the window, center-forward of the plane.

_____ Kathy has a fear of flying and hates small planes. Always check the plane configuration and notify Paul if the plane has less than 5 seats per row. Four seats per row will work when the route requires. However, three seats per row planes should be avoided if at all possible and must be approved by Kathy.

Seat Location

_____ The preference is to sit in the first half of the plane, however, no farther forward than the 5th row in the cabin class they are traveling in. Center is best. Forward of Center is better than Back of Center. When traveling business or first class, the preference is the last row in that cabin.

_____ Always seat Paul on the left side of the plane.

_____ Request seats NOT to be bulkhead seats.

Plane Layout

_____ Print a copy of the plane layout and highlight the seat assignments

_____ Make sure the seats are not next to a galley.

Business Class or First Class

_____ Paul and Kathy prefer the last row in that cabin. Sometimes in international first class, the seats by the window are a single seat only and not together, and they only offer a single seat option. In that case, Paul and Kathy would rather be in the middle of the plane with two seats side by side.

_____ Upgrade - When Paul and Kathy are traveling on a flight lasting longer than 3 hours, the preference is to fly business or first class. Therefore, when researching the flight determine the cost for the upgrades and also evaluate options to upgrade with miles or free vouchers when available. Also, some options allow a reasonable cost upgrade a specific number of hours before the flight. Explain outcome:

~ Paul Traveling Alone ~

_____ When Paul is traveling alone his preference is as far forward as possible in a window seat on the left side, however, not the first row/bulkhead.

_____ Upgrade - Paul prefers business or first class when traveling alone, however, is sensitive to the cost for the upgrade. Paul will always consider the cost of the upgrade whether in dollars or miles relative to the number of hours he is spending on the plane. An upgrade that can be achieved for \$50 or less per hour is very attractive.

~ Kathy Traveling Alone ~

_____ Kathy prefers to sit in the middle of the plane with a window seat.

_____ Be sure and print a copy of the plane configuration with Kathy's seat highlighted.

Baggage

_____ Print appropriate travel packing list for Paul.

_____ Inform Paul a minimum of 7 days prior to departure of the airline's baggage restrictions (i.e.: number of bags, weight, and if international travel, include size) [Not necessary for Southwest or any carrier they've recently flown]

Terminal

_____ Notate on the agenda from what terminal each flight departs

Airline Partner

_____ Check to see what airline is actually the carrier for the flight. Notate if the flight is with a partner carrier (i.e. ticketed with Northwest but flying on a Delta plane)

Frequent Flyer Number

_____ Always be sure to include some Frequent Flyer number for every Neff passenger

Airline Confirmation Number(s)

_____ Include the airline confirmation number(s) in Paul's iPhone

_____ And on the itinerary

Boarding Passes

_____ Coordinate either through staff or Paul or Kathy the printing of boarding passes at the earliest opportunity. (Printing of boarding passes early is important, especially on Southwest.)

_____ Calendar a reminder to print outbound boarding passes

_____ Calendar a reminder for Paul to print the return boarding passes. Be sure not to just calendar this reminder for him 24 hours in advance, but also earlier in the day so he has time to act in case he is unavailable during the first opportunity.

Layovers

_____ If Paul has an extended layover of more than an hour, determine accessibility and locale of an airline club available to us.

Connections

_____ If Paul and/or Kathy is connecting between two different airlines, print a copy of the airport layout and identify the two airline gate areas.

Airline Changes

_____ Be sure and provide the airline Paul's cell phone (Kathy's, if she is traveling alone) as the first number to call if there is a change in the flight departure time, with the office number as the secondary number to call.

Airline Food

_____ Find out what the meals are on the plane flight.

Drink Coupons

_____ If this is a Southwest flight, ask Paul if he'd like any drink coupons included in his travel file.

TRANSPORTATION

Departure transportation to the airport

_____ Family member _____

_____ Staff or hired driver _____

(For both staff and hired driver, check with Paul for the specific pick-up time, and not the driver. If hired driver be sure to provide in the itinerary the driver's name and phone number, and if not known the main company's phone number so they can check for arrival time while the flight is in the air.)

_____ Itinerary sent to driver

Return transportation from the airport

_____ Family member _____

_____ Staff or hired driver _____

(If hired driver, confirm with Paul whether he wants to be met at baggage claim, or if he wants to phone the driver and have curbside pickup. If hired driver be sure to provide in the itinerary the driver's name and phone number, and if not known the main company's phone number)

_____ Itinerary sent to driver - Make sure you've provided the flight information to the party who is picking up, including the airline's phone number so they can check for arrival time while the flight is in the air.

Destination/Arrival Pickup

_____ If a friend or family member is picking up Paul from the airport upon arrival, be sure we have emailed all flight information including phone number to the individual so they can check for arrival time while the flight is in the air.

Rental Car

_____ At larger airports, Paul prefers to use rental car companies that he has a "fast track" relationship with that allows him to go straight to the car and bypass all counters (such as Hertz, Budget, etc.) Check with Paul for the type of vehicle he wants and shop for the best deal. When traveling to Reno, Budget is typically a good option. There is a strong preference to rent from rental companies and that he doesn't have to leave the airport in a bus to get to the car. At some airports there are no cars at the airport and he will have to travel, but be sure to inquire.

- _____ a. Fun Car - Always check with the rental car company to see if they have any "fun or unique" rental car options. Once in awhile Paul is willing to pay up for some new experience when he will be driving a lot.

MapQuest/Google Maps

_____ In travel file, include MapQuest or Google Maps to and from each destination on agenda.

ITINERARY

When Paul Traveling Alone

_____ Once Paul has booked and confirmed a flight, email Kathy the departure and arrival times, airline carrier, flight number, date, and destination, etc.

- ___ a. When you provide Paul a hard copy of his itinerary, provide a second copy for Kathy. Also include his schedule and hotel information.
- ___ b. Email the complete itinerary to Paul's personal email.
- ___ c. If flying internationally, make sure Paul's international phone number is included.

When Paul and Kathy Traveling Together

_____ Email a copy of their itinerary to each child with a brief description from Paul regarding the trip. Also include their schedule and hotel information.

- ___ a. If flying internationally, make sure Paul's international phone number is included.
- ___ b. Email the complete itinerary to Paul's personal email.

Travel Companions

_____ Be sure and provide travel companions all necessary travel information.

_____ Determine with Paul whether companion(s) are reimbursing any travel expense and whether Paul is covering any travel expense.

\$ _____ amount or _____ % to be reimbursed by _____

_____ Paul covering travel expense

Reservations

_____ For reservations, specify if it is included in a package or not.

MISCELLANEOUS

People to Visit

_____ Check the "People to Visit when Traveling" list on server.

Hotel

_____ Check with Paul to determine what type of lodging he desires.

_____ Check www.priceline.com to see if there are any low-price, 5-star hotels in the area Paul where wants to stay.

_____ Check with hotels to see if they have a two/three-bedroom suite, connecting rooms, etc.

_____ Make sure hotel rooms are always non-smoking.

_____ Determine the hotel's cancellation policy and mark your calendar two days prior to the expiration and confirm with Paul that the trip is still on.

_____ When booking hotels, check to see if the hotel is available through the American Express program. If so, book the hotel through the American Express travel agent so that Paul receives all the benefits provided by the program. One of the key benefits from American Express is an automatic room upgrade if available. If we're using American Express, call the hotel to determine their room categories and prices so that Paul can specify what room category he wants to book in order to be eligible for the next room category for the upgrade.

_____ Always ask what special amenities the hotel has: i.e., view or not, special services on specific floors, etc.

_____ Check with the hotel to determine if they give a "religious and/or non-profit discount. Many times only a business card is required to substantiate affiliation.

_____ Ask Paul if he wants massages booked at any location.

_____ Always request a room with a bathtub if possible.

Calendaring

_____ Always enter into Paul's iCal the details of the flight and/or hotel, including the confirmation numbers. He likes to have any flights his kids are taking input into iCal, even if he won't be traveling with them.

_____ When calendaring flights be sure to notate the correct CALIFORNIA time (i.e.: If Neff's are departing London at 9:00 pm, the start time should have entered as 1:00 pm to adjust for the time difference. For further time/date information visit www.timeanddate.com)

Cash

_____ Check with Paul to determine if he needs any cash at least three days prior to departure.

Restaurants

_____ When booking flights, ask Paul if he wants any particular restaurant reservations. Remember, American Express has a special program for high-end/popular restaurants where they guarantee their members the ability to get a reservation.

_____ Don't make dinner reservations on nights they have been driving/traveling all day.

Phones

_____ Ask Paul if he wants you to check the messages on his phones while he is away:

_____ Paul's Cell Phone (daily in afternoon)

_____ Neff Home Phone (Monday, Wednesday, Friday)

_____ If yes, make a reminder note not to forget to check each day

Cruises

_____ Paul always likes to send a personal letter to the Maitre 'D, faxed directly to the ship, to introduce himself in advance and request a specific type of dining room seating.

_____ Monitor on the website when the excursions are available and print out all excursion options at the earliest possible time, ensuring their ability to select and book the most desired excursions before they become full.