



## PLANNING AND IMPLEMENTING AN EXCHANGE TOOLKIT

### Checklist for Adult Exchanges

	Initial Planning
	Identify the purpose of the exchange
	Who will be included and how many?
	Who will lead the delegation?
	Mayor
	City Official
	Business/Community Leaders
	Sister Cities
	Set a tentative date with your sister city 12+ months in advance
	Confirm date and develop a timeline
	Detailed trip planning
	Develop cost estimates
	Determine who will pay for travel, insurance, housing, food, local trips
	Determine visa requirements
	Make sure that everyone has a valid Passport
	Determine vaccination requirements
	Work with International Medical Group®, Inc. (IMG®), SCI's medical insurance partner to provide vaccines to all delegates if group vaccines are needed.
	Will you provide travel insurance? Identify the provider
	Develop waivers, and liability release documents
	Will you offer scholarships to adult delegates?
	Develop a plan to identify host families
	Identify host families and vet (background checks)
	Develop a detailed itinerary
	Prepare and distribute a host family / contact list [N] days prior to departure
	Purchase gifts for host families and host city officials
	Trip details
	Re-confirm that everyone has a passport and visa (if needed)
	Confirm host families
	Confirm flights
	Meet in-bound delegates
	Hold a welcome meeting for all delegates and host families
	Hold an exchange debrief after the exchange is over

## Checklist for Student Exchanges

	Initial Planning
	Identify the purpose of the exchange
	Who will be included and how many
	Who will lead the delegation?
	School officials
	Sister Cities
	Set a tentative date with your sister city 12+ months in advance
	Confirm date and develop a timeline
	Develop and application form and distribute to schools
	Review applications and interview students
	Select students and notify parents
	Detailed trip planning
	Develop cost estimates
	Determine who will pay for travel, insurance, housing, food, local trips
	Determine visa requirements
	Make sure that everyone has a valid Passport
	Determine vaccination requirements
	Work with International Medical Group®, Inc. (IMG®), SCI's medical insurance partner to provide vaccines to all delegates if group vaccines are needed.
	Will you provide travel insurance? Identify the provider
	Develop waivers, code of conduct, and liability release documents
	Will you offer scholarships to delegates?
	Develop a plan to identify host families
	Identify host families and vet (background checks)
	Identify chaperones and vet (background checks)
	Develop a detailed itinerary
	Prepare and distribute a host family / contact list prior to departure
	Purchase gifts for host families
	Trip details
	Re-confirm that everyone has a passport and visa (if needed) and tickets
	Confirm host families
	Confirm flights
	Hold an orientation meeting for all students (what to expect, using their smartphones abroad, money exchange)
	Meet in-bound delegates if applicable
	Hold a welcome meeting for all delegates and host families
	Hold an exchange debrief after the exchange is over