



Group Travel Planning Checklist

For family trips, friend groups, reunions, celebrations, and organization travel. Assign a lead organizer and record who owns each remaining task.

Group or occasion: _____

Lead organizer: _____ Approximate travelers: _____

Agree on the basics

- ☐ Define the purpose, destination ideas, preferred dates, and trip length.
- ☐ Ask travelers about comfortable budgets before requesting quotes.
- ☐ Identify date restrictions, departure locations, and adults and children traveling.
- ☐ Discuss accessibility, dietary, and family needs through an appropriate private channel.
- ☐ Agree on how decisions will be made and who has final authority.
- ☐ Decide which activities will be shared and how much free time travelers want.

Choose the trip and understand the terms

- ☐ Compare options using the same dates, inclusions, occupancy, and total costs.
- ☐ Ask whether a formal group booking is available and useful for your party.
- ☐ Confirm minimum participation, space-hold deadlines, and release conditions.
- ☐ Get any group rates, amenities, credits, or organizer benefits in writing.
- ☐ Confirm what changes if the group size falls, a room is underoccupied, or someone cancels.
- ☐ Review any minimum pickup commitments, unused-room charges, or event fees.

Set expectations

- ☐ Share what is included, optional, and paid separately by each traveler.
- ☐ Disclose how any organizer benefit or group credit will be used.
- ☐ Agree on a booking deadline and explain that unbooked space or prices can change.

Decisions still needed



Group Travel Planning Checklist

Reservations and traveler coordination

Manage bookings and payments

- ☐ Have each traveler verify their reservation name against their travel documents.
- ☐ Confirm room or cabin assignments, occupancy, beds, and roommate arrangements.
- ☐ Record confirmation numbers and booking status in a restricted organizer record.
- ☐ Track deposits, payment dates, balances, and the provider collecting each payment.
- ☐ Use the designated booking process for payments; avoid putting card details in group chats.
- ☐ Explain cancellation, substitution, name-change, and refund terms to every traveler.
- ☐ Have each traveler review insurance options and any purchase deadlines.

Keep communication organized

- ☐ Choose one main communication channel and keep a current contact list.
- ☐ Send one shared schedule with dates, deadlines, meeting points, and time zones.
- ☐ Set a process for reporting a change, late arrival, cancellation, or special request.
- ☐ Confirm who is permitted to change each reservation.
- ☐ Ask travelers to check their own passport, visa, entry, and transit requirements.
- ☐ Remind travelers about check-in windows and required boarding documents.

Plan shared activities

- ☐ Confirm group dining requests, seating limits, and whether arrangements are guaranteed.
- ☐ Reserve shared excursions or events and identify minimum numbers and cancellation terms.
- ☐ Check age, activity, mobility, and accessibility restrictions for each shared activity.
- ☐ Keep optional activities clearly optional and identify any extra costs.
- ☐ Confirm event space, catering, equipment, and supplier rules if hosting a private gathering.

Payment or reservation issue to resolve



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Final logistics and departure

Coordinate transportation

- ☐ Confirm arrival and departure details for each household or booking party.
- ☐ Book transfers with enough seats, luggage capacity, and any required accommodations.
- ☐ Verify hotels, parking, pickup locations, meeting times, and driver contact details.
- ☐ Build in time for delays, headcounts, accessibility needs, and terminal procedures.
- ☐ Decide who handles a missed transfer, delayed flight, or last-minute change.

Prepare the group to travel

- ☐ Send the final itinerary, packing reminders, and relevant provider instructions.
- ☐ Confirm how travelers will communicate if internet or cellular service is unavailable.
- ☐ Record local emergency, supplier assistance, and travel insurance contact details.
- ☐ Arrange a private emergency-contact record with each traveler's permission.
- ☐ Assign a headcount lead for shared transfers and excursions.
- ☐ For cruises, confirm ship-time all-aboard deadlines and return arrangements at each port.

During and after the trip

- ☐ Confirm attendance before shared departures and communicate schedule changes promptly.
- ☐ Keep shared receipts and settle agreed group expenses with a clear record.
- ☐ Close out outstanding supplier issues and collect feedback after the trip.

Open task tracker

Task	Owner	Due date	Status

Planning a group trip? Bring these details to JKA Travel at jkatravel.com.