

# Faculty-Led Education Abroad Handbook

Middle Tennessee State University

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This handbook includes the policies and procedures pertaining to MTSU Faculty-Led education abroad programs. This handbook was prepared on the basis of policies in place at the time of publication and, therefore, all information is subject to change without notice or obligation. This publication is for informational purposes only and is not comprehensive. *This handbook was updated June 2017.*

## TABLE OF CONTENTS

- I. Introduction
- II. Terms
- III. Timelines (brief overview)
- IV. Faculty Policies
- V. Developing the program
- VI. Coordinating the Logistics
- VII. Program Proposal
- VIII. Budget
- IX. Enrollment Maximum/minimum
- X. Selecting Student Participants
- XI. Orientation
- XII. Health Insurance
- XIII. Cell Phones
- XIV. Promotion/Recruitment
- XV. Student Application Process
- XVI. Faculty –Led Resources
- XVII. Emergency Protocols and Support

Appendix A – Faculty Budget packet

Appendix B – Faculty Leaders’ Timeline for both summer and winter programs (detailed)

### I. INTRODUCTION

The Office of Education Abroad (OEA) appreciates your interest in developing an MTSU Faculty-led education abroad program! We look forward to assisting you in what will be a richly rewarding opportunity, both for your own professional development and the academic development of MTSU students.

OEA offers numerous education abroad programs through our affiliated programs, i.e. exchanges, third party providers, etc. However, many of our participants choose to participate on an MTSU Fac-Led program as students generally prefer short-term group programs sponsored by their own university faculty members. They also wish to travel and study with friends and faculty they know and trust, and welcome the ease with which academic credit is applied toward their degree requirements.

#### **What is an MTSU Faculty-Led program?**

Short-term programs led by MTSU faculty member(s) who teach MTSU courses, which are specifically designed for the overseas location. Each program provides students with an

academically enriching experience in the host country while also providing culturally relevant excursions that support the academic experience. Programs are taught in English (with the exception of language credit programs) and are generally 3-6 credit hours. MTSU Faculty-Led programs are typically led during the summer term and are usually 3-4 weeks in duration, although faculty can also choose to lead spring break and winter programs as well.

Developing a Faculty-Led program is more demanding, and involves a great deal more responsibility, than planning and developing an on-campus course. Faculty leaders should realize that they are involved in every aspect of the program. In short, being a faculty leader comes with a hefty job description. At some point, you are likely to act as a recruiter, admissions and enrollment manager, academic advisor, student life advisor, disciplinarian, accountant, travel agent, referral service, tour guide and instructor. Leading an academic program abroad entails great responsibility that begins long before the group departs for the international destination.

Although planning and implementing a Fac-Led program will take much time and effort on the part of faculty leader, it is also an extremely rewarding experience for the faculty and the students. In order to help guide faculty leaders through all aspects of the development phases, this handbook has been created to offer assistance in various areas.

## II. TERMS

OEA – Office of Education Abroad  
 OIA – Office of International Affairs  
 IEEC – International Education and Exchange Committee  
 ISA – International Studies Abroad  
 CIEE – Council on International Education and Exchange  
 CCSA – Cooperative Center for Study Abroad

## III. TIMELINE

In order to assist faculty leaders through the entire education abroad process we have created a broad overall timeline (below) AND a very detailed faculty leader’s timeline of suggested tasks for each month (see Appendix B). *Consortia faculty leaders: please note that most consortia have much earlier deadlines for their specific application process and your proposals will still need to be approved by the IEEC. Please contact the consortia regarding their specific timelines.*

### Timeline for Summer 2018 MTSU Faculty-Led education abroad programs

Fall 2016/Spring 2017	Faculty meets with David & Katie to discuss possibilities
Jan - August 2017	Faculty develops the program (it is highly recommended that faculty leaders use OEA affiliates listed in the logistics section).
April - early September 2017	Faculty submits the Program Proposal (If proposal is submitted in April - when the IEEC is still meeting - then

	the program can be approved early to allow for summer and early fall recruiting)
September 1, 2017	<b>Proposal deadline</b> for all MTSU Faculty-Led Summer programs ( <b>both new AND reoccurring</b> ). OIA/OEA provides initial approval and IEEC reviews course proposals and approves program.
September – October 2017	Faculty submits TA and opens clearing account with the assistance of Ben Jones.
October 2017	*New faculty leaders attend meeting/briefing led by OIA & EA to discuss budgeting, recruiting and marketing, collecting money, registration, insurance, financial aid, other policies and guidelines, etc.
October 2017 - Feb 2018	Faculty recruits, collects applications (with deposits), and accepts participants.
November 2017	Faculty participates in on-campus Study Abroad Fair.
late February 2018	Faculty decides if program will run (or "make") based on the number of qualified applicants, non-refundable deposits in clearing account, additional payments, etc. <u>Faculty cancels program if necessary.</u>
March 2018	Faculty works with accepted participants to make sure all have submitted liability paperwork (called Pathway Packet) to the OEA due at the end of March
April 2018	<u>ALL</u> faculty leaders attend meeting led by Vice Provost for International Affairs to go over emergency guidelines and procedures.
April 2018	Faculty participates in MTSU Pre-departure mandatory student orientation.
May – August 2018	Faculty leads MTSU Faculty-Led program!!

### **Timeline for Winter 2018-19 MTSU Faculty-Led education abroad programs**

\*It is recommended that faculty wishing to lead a Winter 2018 program attend these meetings/workshops as they are held once a year.

Spring 2017/Summer 2017	Faculty meets with David & Katie to discuss possibilities.
August 2017 - January 2018	Faculty develops the program (it is highly recommended that faculty leaders use OEA affiliates listed in the logistics section).

February 15, 2018	<b>Proposal deadline</b> for all MTSU Faculty-Led Winter programs ( <b>both new AND reoccurring</b> ). OIA/OEA provides initial approval and IECC reviews course proposals and approves program.
February – March 2018	Faculty submits TA and opens clearing account with the assistance of Ben Jones.
March 2018	Faculty participates in on-campus Winter mini-fair if enough programs warrant event.
March – October 2018	Faculty recruits, collects applications (with deposits), and accepts participants.
October 2018	Faculty decides if program will run (or "make") based on the number of qualified applicants, non-refundable deposits in clearing account, additional payments, etc. Faculty cancels program if necessary.
October/November 2018	Faculty works with students to make sure all have submitted liability paperwork (called Pathway Packet) to the OEA which is due in mid-November.
November 2018	Faculty participates in MTSU Pre-departure mandatory student orientation.
December 2018 – January 2019	Faculty leads MTSU Faculty-Led program!!

#### IV. FACULTY POLICIES

##### Updated and effective June 15, 2017

As these policies are updated annually, faculty leaders are responsible for informing themselves of any changes. These are MTSU policies, which help to fulfill the Office of Education Abroad and Forum on Education Abroad mission statements.

##### 1. *Non-academic international groups*

All staff and faculty-led non-academic international groups (i.e. campus recreation, history tours, basketball team or any other group *not* enrolling in an MTSU course for academic credit) will be fully managed within the departments. The Office of International Affairs (OIA) can serve as a resource regarding liability insurance and paperwork as well as other pre-departure recommendations when needed.

##### 2. *Student enrollment requirements*

All MTSU Faculty-led education abroad participants (both MTSU degree-seeking and non-degree seeking) *must* be enrolled in the appropriate education abroad course approved by the International Education and Exchange Committee during the term of the program in order to participate. If a faculty member would prefer to run a non-academic international group instead, this will be managed through the department (see policy I).

### *3. Non-degree/transient participants*

Non-degree seeking and/or transient individuals are only eligible to participate on MTSU Faculty-led and Confucius Institute affiliated programs. After admittance into MTSU occurs and student is approved by the OEA and faculty leader, these individuals must follow the same OEA procedures and policies as degree-seeking MTSU students including, but not limited to, completion of required liability forms by listed deadlines, participation in the mandatory pre-departure orientation, enrollment in the education abroad course for that program, and full participation in all domestic and international components of the program. Non-degree seeking and/or transient participants do not qualify for MTSU funding, including the tuition discount for Faculty-led programs, MTSU financial aid, or the MTSU EA Scholarship. All non-degree seeking/transients participants must be 18 years of age prior to program departure.

### *4. Participants under the age of 18*

Students must be 18 years of age at the time of participation on the MTSU Faculty-led program. However, students may complete the application process when they are under the age of 18 with the understanding that a parent/guardian signature on application and enrollment forms may be required. In special cases, students under the age of 18 may participate with the permission of the faculty leader/program director. International Affairs and the Office of Education Abroad do not support the participation of minors on MTSU Faculty-led programs.

### *5. MTSU Faculty-Led Program Proposal deadlines*

Only MTSU Faculty-led program proposals which are submitted by the deadlines provided on the Office of Education Abroad (OEA) website will be considered for approval.

### *6. MTSU Faculty-Led Pay Policy*

#### *Summer Programs:*

- a.* A faculty member who teaches an education abroad course, which is approved by the International Education and Exchange Committee (IEEC), on an MTSU Faculty-Led program or CCSA program will receive compensation at the MTSU faculty summer rate of pay for one course provided the course meets a minimum of eight enrolled participants.
- b.* If a faculty member is teaching two IEEC approved education abroad courses as part of the same program AND each course meets the minimum of eight enrolled participants, that faculty member will receive compensation at the summer rate of pay for each course.
- c.* Only course(s) which are set up as “study abroad sections” using the procedures provided by OEA will be eligible towards faculty pay. Only education abroad participants who are enrolled in these “study abroad sections” will count towards the eight minimum.
- d.* All enrolled education abroad participants must fully participate on the education abroad program, including completion of all OEA policies and student application procedures, attending the mandatory orientation, and being present for all in-country itinerary activities set by faculty leader in order to count towards the eight minimum.
- e.* The MTSU Faculty-Led and CCSA courses are included in the faculty member’s teaching load and count toward the faculty member’s summer instructional pay cap.
- f.* Faculty members with low enrolled MTSU Faculty-led and CCSA courses may be eligible for prorated summer pay and should speak with the VPIA.

*Winter/Other short-term programs:*

Winter/Spring Break/Fall Break faculty members should speak to Dr. David Schmidt and their Dean regarding pay guidelines.

#### *7. Family member/dependent attendance*

A successful faculty-led program depends on the full attention and leadership of the faculty member. Faculty leaders are on call 24/7 during the program and will be not only teaching but also managing other aspects of the program including student conduct, medical issues, etc. (even if using a third party provider). Therefore, the OEA and OIA strongly discourage family member participation or accompaniment on education abroad programs. However, if the faculty leader has a specific reason and meets with the VPIA ahead of time for approval, the following criteria will apply:

- a. All family accompaniment or participation must be disclosed as part of the program proposal. Family participants cannot be added after the program's approval.
- b. Faculty leaders must cover any and all costs incurred on behalf of his/her family member(s). These expenses cannot be included in the program budget. It is the responsibility of the faculty leader to pay for all expenses related to accompanying family members. If family members accompany the group on any portion of the program, it is important to make sure that the student program fee does not cover the housing, meal, or excursion costs of the family members in any way (i.e. group transportation, accommodations, etc.).
- c. No one under 18 years of age may participate or accompany the faculty leader during the program.
- d. The family member must enroll in the basic iNext plan at his/her own expense.
- e. The family member must sign a liability waiver, which can be provided by the OIA. For liability purposes, it is important that family members do not have responsibilities related to the program.
- f. Family members cannot share accommodations with student participants.
- g. Family members should not compromise the planned academic program or prevent student participants from engaging fully in the program in any way.

#### *8. Adjunct Faculty & Full-Time Temporary Faculty Policy*

Only full-time tenure track MTSU faculty may lead MTSU Faculty-led education abroad programs.

#### *9. Housing Arrangements*

Faculty/staff members cannot share accommodations (room and/or apartment) with education abroad participants.

#### *10. Faculty-Led course set-up*

Faculty education abroad program leaders must set up a "study abroad section" of their course(s) with the MTSU Scheduling Office using the guidelines provided by OEA. Only course(s) which are approved by the IEEC are eligible.

### *11. Collection of Program Funds*

Faculty leaders should not collect the MTSU Education Abroad Fee and/or the iNext insurance fee. These fees are paid directly to the OEA by each education abroad participant individually when completing the Pathway Packet liability forms.

### *12. Faculty Led Program Cancellation Policy*

If based on the recommendation of the IEEC, the VPIA determines that a program should be cancelled or terminated due to an emergency or crisis situation, the process for notification and refunds will be determined by the IEEC.

- *State Department Travel Warning or Center for Disease Control Travel Health Warning*  
If either the US Department of State or the Centers for Disease Control issue a travel warning for the area where a MTSU program is being conducted, the OEA will consult with IEEC. Depending upon the severity of the warnings, MTSU will suspend approval of education abroad while the warning is in effect. If following consultation with IEEC, MTSU decides to continue the program, the updated information must be distributed promptly to students and students must be permitted to withdraw.
- *Financial responsibility*  
Middle Tennessee State University does not assume responsibility for financial risks associated with participation in its faculty-led education abroad programs. If the University cancels a program prior to departure or while the program is in progress for reasons beyond its control including, but not limited to, such things as political unrest or danger to participant safety, only those fees refunded to MTSU by service providers will be returned to participants. MTSU will make reasonable efforts to obtain refunds from service providers such as hotels, airlines, and tour agents, etc., but no refunds are guaranteed. Fees paid will only be refunded to program participants to the extent they are refunded to MTSU.

### *13. Disciplinary Policy*

An IEEC subcommittee will be created to hear disciplinary cases of issues from students abroad. The subcommittee will determine a response to the case and might request additional information from the student in doing so. Based upon their decision, a recommendation will be made to the VPIA. The consequences could include revocation of the Education Abroad scholarship, if a student has received one, or referral of the case to the University's judicial board depending upon the severity of the charge.

## **V. DEVELOPING THE PROGRAM**

In preparing to develop a program, please note the following:

- Faculty leading new programs should expect to begin the development process 16-24 months prior to the program departure date.
- It is recommended that faculty leaders who plan to lead a new program submit a Statement of Intent to [educationabroad@mtsu.edu](mailto:educationabroad@mtsu.edu) including a short statement outlining the program location(s), rationale, proposed course, and a rough budget. Before submitting the Program



Proposal it is also highly recommended to schedule a meeting with the VPIA and OEA Director, as well as your departmental Chair and Dean.

- Faculty should take time to figure out what type of program they want to build (see logistics section below). In addition, creating a budget is one of the most difficult challenges when developing an education abroad program. OEA can recommend price points, length of time, country suggestions, etc. if requested. OEA recommends that first-time faculty leaders develop their program in one city, possibly with one or two day excursions, and expand to additional cities (if desired) only on future programs. Doing so not only helps keep costs down, but can also have other benefits as stated below.
- As described in the Forum on Education Abroad Standards of Good Practice for Short-Term Education Abroad Programs... “Faculty and program sponsors should consider carefully the number of sites proposed to visit, their geographical proximity to each other and the time spent traveling between them. More emphasis should be given to having full, in-depth experiences at each site rather than on “seeing everything” by visiting multiple sites and spending only short amounts of time on each site. Faculty and sponsors should justify the amount of travel proposed. *Visiting a large number of sites and/or countries does not necessarily provide an optimal educational experience.*” OEA actually recommends that all faculty leaders’ focus their program on one city to increase the likelihood that their participants have the opportunity for local immersion – much like semester education abroad participants experience.
- When developing a program, faculty leaders will generally plan instructional time during part of the day followed by cultural events/activities and time for reflection in the afternoon and evening. An ideal program would also provide opportunities for students to interact with members of the host culture and participate in experiential learning projects when possible. Of course allotted free time on some evening and weekends for students is also necessary.
- Middle Tennessee State University is a member of The Forum on Education Abroad and supports its Standards of Good Practice. The following are best practices are recommended for all MTSU Faculty Led education abroad programs:
  - Per established university standards, a minimum of 37.5 instructional contact hours should be built into a three credit hour program & 75 instructional contacts hours for a six credit hour program.
  - Instructional contact hours can be made up of in-class lecture/instruction as well as academic activities where students are engaged in the learning objectives of the program such as cultural site visits, guided tours, group discussion/reflection time, guest lectures, etc. Travel time *may not* be counted towards the required number of instructional contact hours.
  - The average summer education abroad program is 3-4 weeks. However, in order to achieve the needed instructional hours, the following program lengths are highly recommended:
    - Three credit hours programs: a minimum of 14 days in duration with a minimum of 12 days in country.
    - Six credit hour programs: a minimum of 28 days in duration with a minimum of 24 days in country.

- Programs that are unable to meet these minimum recommend lengths must schedule academic instructional hours prior to and after the in-country part of the program and include these details in the itinerary.
- Winter programs can be up to 3 credit hours and the course will be set-up for the MTSU spring semester.

## VI. COORDINATING THE LOGISTICS

### What are the options available to MTSU faculty members who want to lead an education abroad program?

#### a. *MTSU Signature Faculty-Led Program:*

Faculty Leaders **can choose to arrange all logistics on their own**, which is simply called an MTSU Signature Faculty-Led program. Building an entire program and organizing all logistics is an incredible amount of work and faculty leaders who choose to do so should fully understand all of the steps involved before moving forward. Faculty leaders who choose to go this route should set up an appointment with [David.Schmidt@mtsu.edu](mailto:David.Schmidt@mtsu.edu) far in advance of the proposal deadline AND consider using Go-Today Travel and/or StudentUniverse to help with the organization and budget.

##### • *Go-Today Travel*

Go-Today is a travel/tour organization that has a team who specializes in group travel, but also has experience working with higher education institutions (so they better understand faculty and education abroad program needs). This option works well for faculty who would prefer to make all of the programmatic decisions, but work with one organization that makes all of the logistical arrangements (and collects one payment for everything!). Faculty members can contact [go-today travel](http://go-today-travel.com) and please copy [Katherine.Kovar@mtsu.edu](mailto:Katherine.Kovar@mtsu.edu) to start a conversation about options or request a sample itinerary in a specific location.

##### • *Student Universe*

Student Universe is a travel/tour organization that has a team who specializes in group travel, but also has experience working with higher education institutions (so they better understand faculty and education abroad program needs). This option works well for faculty who would prefer to make all of the programmatic decisions, but work with one organization that makes all of the logistical arrangements (and collects one payment for everything!). Faculty members can contact [Student Universe](http://StudentUniverse.com) and please copy [Katherine.Kovar@mtsu.edu](mailto:Katherine.Kovar@mtsu.edu) to start a conversation about options or request a sample itinerary in a specific location.

#### b. *MTSU Faculty-Led Program (third-party customization):*

Faculty can consider **working with an OEA approved affiliate third-party provider** to organize the logistics of the program. This type of program is still called an MTSU Faculty-Led program (you are just choosing a third party provider to customize the details). Our affiliates will develop customized programs in which the MTSU Faculty Leader retains the

academic control of the program, but receives a great deal of support with the arrangements including housing, classroom space, excursions, group transportation and airport pick-up, or even service-learning projects. The Student Program Fee may be slightly higher (not always), but the cost will be worth the time saved and the peace of mind having one organization and contact responsible (and one invoice to pay) AND emergency support including 24/7 residential local staff.

*Below are two established third-party providers which allow its affiliates (including MTSU) to use their facilities to create short-term faculty programs. These programs work well for faculty leaders who would prefer to stay in one city (or be based in one city with a couple of day excursions) and work with a local university for classroom space, local speakers, etc. Because ISA & CIEE work with a local university/staff to build the program, interested faculty should begin this process at least one year in advance.*

1. [ISA \(International Studies Abroad\)](#)

Faculty members interested in learning more about ISA custom program options should click on the website above and read more about their locations, inclusions, etc. You can also email [cp@studiesabroad.com](mailto:cp@studiesabroad.com) and copy [Katherine.Kovar@mtsu.edu](mailto:Katherine.Kovar@mtsu.edu) to start a conversation about your options.

2. [CIEE \(Council on International Education Exchange\)](#)

Faculty members interested in learning more about CIEE custom program options should click on the website above and read more about their locations, inclusions, etc. You can also email [custom@ciee.org](mailto:custom@ciee.org) and copy [Katherine.Kovar@mtsu.edu](mailto:Katherine.Kovar@mtsu.edu) to start a conversation about your options. You can see some of the programs CIEE has built with other US universities [recently here](#).

c. *MTSU Consortia-Led program:*

Faculty leaders may also **choose to apply to teach on an affiliated consortia program**. Interested faculty should contact the consortia directly to understand their individual application process and timeline, keeping in mind the internal MTSU proposal deadlines as well. **MTSU faculty teaching on an affiliate consortia program must still submit a program proposal to MTSU.**

• [CCSA \(Cooperative Center for Study Abroad\)](#)

Faculty members interested in learning more about how to teach on a CCSA program should click on the website above and read more about the locations, application process, etc. You can also email [Jerry@ccsa.cc](mailto:Jerry@ccsa.cc) and copy [Katherine.Kovar@mtsu.edu](mailto:Katherine.Kovar@mtsu.edu) to start a conversation about your options.

## VII. PROGRAM PROPOSAL

AFTER you have chosen the type of program you would like to build, you should begin working on the program proposal. **The MTSU Faculty-Led Program Proposal (for both faculty-led and faculty-led third party customization) is [located here on the faculty section of the OEA website by clicking on program materials](#).** This packet, along with any supplemental materials, should be

submitted **by September 1<sup>st</sup> for summer programs or February 15<sup>th</sup> for winter or spring break programs.**

It is important to note that all MTSU program proposals are reviewed by the Vice Provost for International Affairs (VPIA), Office of Education Abroad (OEA) and the International Education and Exchange Committee (IEEC) and must have academic departmental approval. The IEEC is a university-standing committee that includes peer faculty from each MTSU college and seasoned education abroad faculty (see current IEEC representative list on International Affairs website, [www.mtsu.edu/intered/](http://www.mtsu.edu/intered/)). **The MTSU Faculty-Led Program Proposal needs to be submitted *each time* a program runs as the IEEC approval is only per term, not program.**

Note for consortia-led (CCSA): [The MTSU Consortia-Led Program Proposal documents are also provided on proposal materials section here.](#)

## VIII. BUDGET

Particular attention must be given to the program cost, **especially the Student Program Fee (SPF)**. The OEA has institutional memory regarding the best price points for MTSU students considering location and the duration of a program, if requested. *Budgets should be determined prior to the program proposal submission to the IEEC.* (If a faculty leader is applying to teach with a consortium then a budget will be established for you).

It is MUCH easier to develop a budget, collect money from students, set deadlines for payments, and pay invoices if working with a third-party provider or go-today travel. Faculty who choose NOT to work with the OEA affiliates to develop the program *will be fully responsible for understanding and working with these outside organizations individually.*

Before you begin the budget, please thoroughly read and understand the MTSU Faculty-Led Budget packet provided at the end of this handbook (see Appendix A). Creating a program budget will likely be one of the most time-consuming pieces of the program development and faculty should read and understand the details in this packet before beginning the process. A sample budget AND interactive spreadsheet [are also accessible here on the OEA website.](#)

## IX. ENROLLMENT MAXIMUM/MINIMUM

Beginning in 2015, Faculty Led courses must have 8 MTSU students enrolled in the course (or 8 in each course) to receive full faculty salary/compensation. A prorated salary may be possible if fewer than 8 students enroll in the course, but the faculty leaders are responsible to meet with the VPIA to discuss this option prior to the start of the program (see faculty policies). Faculty leaders are also responsible for meeting with their Chair/Dean ahead of time to discuss any salary concerns.

OEA/OIA strongly recommends that faculty/student ratio does not exceed 1:12 for health and safety concerns.

## X. SELECTING STUDENT PARTICIPANTS

According to the [OEA student policy listed on the website](#), the minimum GPA requirement is a 2.0 for short-term participants at the time of application. The faculty leader may decide, however, to assign a higher GPA requirement to their program.

As noted in the Faculty Leaders' Timeline (see Appendix B), **students must first request online pre-approval from OEA prior to submitting an application to the faculty leader.** (OEA is checking to make sure that students meet all policies before applying for the actual program to prevent acceptance that must later be reversed).

However, the faculty leader may also decide to require a reference, on-campus interview, or other criteria for acceptance into their particular program. Whatever criteria the faculty leader chooses, these should be clearly communicated in the MTSU Faculty-Led Program Proposal and to all students at the time of application.

**It is the faculty leader's responsibility to create an application, determine the criteria for selection, inform participants of their acceptance, and provide the final list to the OEA at the appropriate time.** [The Faculty Timeline section \(Appendix B\) and Faculty-Led Resources here on the OEA website](#) will provide various tools and advice regarding this phase of the student application process.

Faculty leaders should read through the entire [EA Student Policies and Requirements documents](#) located [here on the OEA website](#) before selecting their participants.

## XI. ORIENTATION

A pre-departure orientation is a required part of all education abroad programs, including MTSU Faculty-Led, **for both students and faculty leaders.** [OEA coordinates this meeting and provides Faculty Leaders with the date and time several months in advance \(also available on the Events and Deadlines section of the OEA website\).](#) OEA/OIA will lead the beginning Health and Safety section of the orientation meeting and then faculty leaders will lead their break-out sessions to discuss various topics including budgeting, culture, behavioral expectations, packing, etc.

Faculty leaders are encouraged to require additional meetings prior to the mandatory pre-departure orientation, especially to focus on academic expectations, **but must also require attendance of their participants to the already scheduled orientation by OEA/OIA.**

Participant attendance is strictly mandatory to convey to students that faculty leaders and OEA are serious about the program, to diminish disciplinary problems and emphasize faculty's expectations, and to reduce liability. OEA will provide more details regarding topics for the faculty leaders' breakout sessions closer to the time of the orientation.

*Consortia-Led program note: Students and faculty leaders with CCSA will attend/participate in the MTSU orientation mentioned above.*

## **XII. HEALTH INSURANCE**

In order to meet MTSU requirements, all MTSU education abroad participants and faculty leaders will be enrolled in the iNext basic plan. Participants will pay this fee (\$32) to the OEA as part of the required liability documentation (Pathway Packet). **Faculty should not collect these fees.** If determined by the VPIA, some programs may be required to purchase a more comprehensive plan or other insurance add-ons, such as political evacuation, depending on the current situation abroad.

OEA will cover the iNext plan fees (for basic coverage only) for faculty leaders who are teaching a course only.

## **XIII. CELL PHONES**

OEA/OIA requires cell phone access to all faculty leaders for the duration of the program. Below are some suggestions:

1. Contact your personal cell phone company to purchase international service.
2. Check with your contact abroad as they may be able to assist you in renting/purchasing a phone in country.
3. You may be able to bring your personal cell phone and purchase a SIM card when abroad.
4. If you are using a third party provider, many times a cell phone will be provided for you.

## **XIV. PROMOTION/RECRUITMENT**

While the OIA & OEA will provide assistance and resources, faculty leaders are ultimately responsible for recruiting students for their programs. A detailed guideline providing “Tips for Recruiting” is included in the Faculty Led Resource [section of the OEA website](#). Other suggestions and guidelines are provided in the Faculty Timeline section (Appendix B) of this handbook. OIA will also assist with the cost of printed materials up to a specified amount. Faculty leaders whose program proposal has received initial approval by the VPIA will receive an email from OEA regarding brochure creation.

## **XV. STUDENT APPLICATION PROCESS**

The OEA will assist students through the entire application process. However, we highly encourage faculty leaders to become familiar with this process in order to better advise the student participants. The “Getting Started” [section of the OEA website](#) outlines the steps to studying abroad for students. While the process is generally similar each year, OEA does update and improve the process annually so faculty leaders should check the website starting in August of each year for the most accurate information.

## **XVI. FACULTY-LED RESOURCES**

In order to assist faculty leaders through the entire education abroad process (starting with the program proposal to the end of the actual program) we have created a month by month timeline

of suggested tasks. This Faculty-Led Timeline section of the (Appendix B) includes suggestions and reminders regarding program applications, decision making, deadline recommendations, collecting money, etc. [In addition, we have added some resources here on the OEA website, including sample budgets, recruiting tips, sample applications, sample payment forms, etc.](#)

Note about winter programs: As MTSU does not offer January term, winter programs usually begin towards the end of December and return in mid-January. However, faculty leaders should check the MTSU Academic Calendar to schedule the return date in time for students to begin their spring semester. All MTSU Faculty-Led winter programs will offer one course, up to three credit hours, which will be set-up as a study abroad section with the MTSU Scheduling Office for the spring semester.

## **XVII. EMERGENCY PROTOCOLS AND SUPPORT**

The MTSU OEA Emergency Response Manual will be emailed to faculty leaders by the OEA. In addition, the VP/IA will also lead an annual meeting detailing emergency protocols in March/April.

# Faculty Led Budget Packet

How to develop a budget for an MTSU Faculty Led program

## APPENDIX A

Office of International Affairs • Middle Tennessee State University  
Box 120, PH 216, Murfreesboro, TN 37132 • Office: (615) 898-8190 • Fax: (615) 898-5510  
international@mtsu.edu • [www.mtsu.edu/intered](http://www.mtsu.edu/intered)

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educationabroad@mtsu.edu • [www.mtsu.edu/abroad](http://www.mtsu.edu/abroad)



## **DEFINITION OF COSTS/FEEES:**

All MTSU Faculty-Led education abroad programs are wholly self-supporting. This means that all costs of offering the program should be **covered by the program fee charged to the participating students (which includes faculty expenses)**. All efforts should be made to keep such costs to a minimum without, of course, jeopardizing the quality of the program. To begin, there are several essential categories to consider when calculating an overall budget as defined below. [A sample budget and an interactive budget spreadsheet are located on the Faculty Led resource section of the OEA website for your convenience.](#)

## **OVERALL PROGRAM COST (OPC):**

The OPC is the sum of all costs associated with running the program, detailed below. This will be the total amount that is reconciled upon return. Items such as the number of student participants (minimum and maximum) as well as the gender mix of students when calculating lodging costs are examples of determining factors. As a result, the Overall Program Cost will have some flexibility but not much if calculated properly. This figure must be determined and made available if/when applying for any Office of International Affairs (OIA) support.

### **a. FACULTY OVERALL COST (FOC):**

Includes any costs that Faculty Leaders will incur and will seek reimbursement for or will need covered (i.e. airfare, accommodations, per-diem, cell phone, in-country transportation, etc.) The FOC may be covered by the academic department, the OIA, or even out-of-pocket but is mainly rolled into the Student Program Fee. It is up to the Faculty Leader to determine how their FOC will be covered.

*Please note: Salary is not included in this calculation. The determining factor in receiving Faculty Leader pay for summer programs is the number of students enrolled in the course. The University approved minimum number of enrolled students to receive summer pay (as of September 2014) is eight.*

### **b. FACULTY EXPENSES (FE):**

This is the *portion* of the Faculty Overall Cost that will be rolled into the Student Program Fee (meaning not covered elsewhere). Depending on the program, the Faculty Overall Cost and the Faculty Expenses may be the same amount.

### **c. STUDENT PROGRAM FEE (SPF):**

This is the amount that the Faculty Leader *collects* from the students using the program clearing account. Faculty will determine what is included in the Student Program Fee, but a typical program would include the following: student accommodations, some group transportation, excursion and admission fees, some meals, and the Faculty Expenses (FE).

### **d. STUDENT OVERALL COST (SOC):**

This amount includes the Student Program Fee *plus* additional fees that the students will either pay to MTSU, OEA, or bring with them on the program. Examples include MTSU tuition, iNext travel insurance, Education Abroad Fee, airfare (if not included in SPF), and personal expenses. Please see example of a Student Overall Cost sheet [on the OEA website](#). The Faculty leader should complete and include this SOC sheet in the IEEC Program Proposal. OEA will recommend any changes and send to the MTSU Financial Aid Office as this sheet will be used to determine the

students' cost of attendance for the term abroad. The SOC is most beneficial to the student as it will assist them in creating a budget.

**e. MISC/EMER/ADMIN FEES (AF):**

Any costs that cannot be categorized above but are to be considered in the calculation of the Overall Program Cost. OEA recommends that Faculty leaders estimate \$100 - \$200 per student (as part of the SPF) to be used in case of an emergency, phone call fees, currency conversion estimation issues, or payment fees such as wire transfers.

*Please note: Student can receive reimbursement after the program ends should this fee not be needed while abroad. If the program received funding from OIA, however, the surplus will go to cover this funding first.*

**DETERMINING AND CONFIRMING THE BUDGET:**

Below are a few examples of items to consider when determining the budget.

- Please set an appointment with the VPIA (if not using an OEA affiliate) or Director OEA (if using an OEA affiliate) to discuss and confirm the education abroad program budget. Budgets should be determined as much as possible prior to the program proposal submission to IEEC.
- Is the Student Program Fee too high and, if so, are there any costs that can be reduced? The OEA has institutional memory regarding the best price points for MTSU students considering location and the duration of a program.
- We recommend that the budget is created based on eight participants (or even lower if you plan to run your program regardless of salary). If, for example, you budget your Student Program Fee for 10+ students and you don't recruit enough participants then you will have to increase the program fee for your current students, which is obviously a situation to avoid. There have been several times when a first-time program had to be cancelled because the faculty leader was only able to recruit 6-7 students. However, had that faculty leader budgeted for 6 students, the program could have run (although the faculty leader would not receive their salary).
- Be certain to calculate the Student Program Fee with variable factors in mind. Don't forget to include the Faculty Expenses (FE) as well as the Administrative Fees and consider other possible issues, such as accommodations. For example, if you plan to budget for 8 students and only budget four hotel rooms (shared) then you may have to raise the SPF if you end up with 7 females and 1 male and need more rooms.

**INTERNATIONAL AFFAIRS (OIA) PROGRAM SUPPORT:**

- All OIA funds **must be requested by September 1st** for summer and spring break programs. This date has been established early because any pledged OIA support will determine the appropriate Student Program Fee (which is advertised for recruiting purposes no later than October). [Please click on this link for the form.](#)
- If there is any departmental or outside financial support, this must be made transparent and disclosed when applying for OIA support.
- OIA funds cannot be included when determining or requesting an advance.
- Note that all OIA funds are awarded "up to" a specific amount for specific items (i.e. airfare, lodging, etc.). Funds awarded for one item cannot be transferred or mingled with other items or categories.

- When a Travel Claim is submitted upon return, the OIA funding request form is referenced to determine allocated funds.

#### **AFTER BUDGET IS DETERMINED AND CONFIRMED:**

- Establish deposit and payment deadlines. In setting these deadlines, please note the following recommendations.
  - The establishment of firm and early deadlines is the best strategy for success.
  - Non-refundable deposits should be no less than \$500. Faculty should not accept an application without the deposit.
  - Typically Faculty Leaders establish one deposit deadline and two payment deadlines.
  - Faculty Leaders should keep in mind the payment deadlines established by the third-party providers and/or travel agency when creating the SPF payment deadlines.
- Create a group TA for your program. [The interactive group Travel Authorization form is available on the MTSU Business Office website.](#) If you need assistance creating a TA, please contact your department AA and/or Ben Jones. Faculty Leaders should route their signed (must first be signed by department head) Group Travel Authorization (TA) with cover letter to the OIA. Please be aware that OIA will only need to sign the TA if funding is provided, however, Dr. Schmidt will need to sign the cover letter regardless. Instructions on how to create the cover letter [is provided here on the OEA website.](#) Faculty Leaders will receive an email from Accounting Services after the TA is approved. This email contains instructions on how to submit a Travel Claim (TC) upon return.
- Establish a clearing account.
  - Email [Ben.Jones@mtsu.edu](mailto:Ben.Jones@mtsu.edu) in the Business office to request a clearing account. Please be aware that your TA and program proposal must first be submitted.
  - Students will deposit their Student Program Fees directly into the established clearing accounts at the Student Services Admin Building (MT One Stop) and Faculty Leaders will use this account to pay hotels, chartered buses, or third-party provider, travel agencies, etc.
  - Money should not be collected by departments, faculty, administrative assistants, etc. This is strictly prohibited by MTSU policy. It is a policy and practice implemented to protect the Faculty Leader.
  - Faculty Leaders can track deposits/payments and clearing account totals using Banner Finance or by keeping track of the collected student payment forms (we highly recommend faculty check Banner Finance on occasion, however, in case of misplaced funds). An example of a student payment form is included in the Faculty Resources [section of the OEA website.](#)

#### **OTHER BUDGET DETAILS:**

- Faculty Leaders will make any advanced payments or purchases from the clearing account to the travel agency, third-party provider, etc. Depending on the program, this may occur very early. Questions can be address to Ben Jones in the Business Office regarding how to make payments from a clearing account.

- Request cash advance if required and if the clearing account total supports needed amount. Please note: A cash advance is actually a loan made to the Faculty Leader and it must be reconciled with supporting receipts upon return and does not include OIA funding.

**UPON RETURN:**

- Faculty Leaders are responsible for reconciling the clearing account, cash advance (if applicable) and submitting a [Travel Claim \(TC\) to the MTSU Business Office within 30 days of the end of the program](#). One Travel Claim must be filed for the entire program. Separate claims for the group and the faculty will not be accepted. If funds remain in the clearing account, they are to be returned first to the OIA (if funds were provided to sustain the program) and if funds still remain then to the participants equitably. Faculty Leaders should use the instructions previously sent from Accounting Services when submitting the TC. Departmental AA's may also be able to provide advice with this process.

# Faculty Leaders' Timeline, Summer & Winter

Tools and timeline for leading an MTSU Faculty Led EA program

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## APPENDIX B

Office of International Affairs ♦ Middle Tennessee State University  
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educationabroad@mtsu.edu ♦ [www.mtsu.edu/abroad](http://www.mtsu.edu/abroad)

## Faculty Leaders Timeline for Summer Programs

Although very detailed, the following is not comprehensive as each Faculty-Led program is unique. OEA will also send frequent emails, especially if any changes or updates have occurred.

### JANUARY - AUGUST (year prior to program)

- *Program proposal:* After reading the Faculty Led Handbook and meeting with OEA/OIA, faculty leaders should develop the program and complete the program proposal. Please keep in mind that creating the budget itself can take several weeks to several months, especially if you choose not to work with an OEA affiliate.

### SEPTEMBER

- *Program Proposal deadline:* Faculty leaders will submit the MTSU Faculty Led Program Proposal by the September 1<sup>st</sup> deadline (same for both new and reoccurring programs). [After proposal submission, faculty leaders should begin working on the following items as soon as possible.](#)

- *Program Application:* You will create your own Student Program Application. [OEA has a template here if you choose to use it.](#) The Student Program Application will be submitted by the student to the faculty leader, and you will use these applications to choose your participants. Do *not* accept Program Applications without a non-refundable deposit!
- *Setting Deadlines:* Faculty leaders will also set their own student application and payment deadlines. OEA recommends a December student application deadline. If you prefer a later application deadline, it should not be later than mid-February. (Why? Because OEA needs to know by late February/early March if your program is running!) In addition, faculty leaders should collect a non-refundable \$500 deposit with the application (without a deposit, it's just a piece of paper!). Faculty leaders should also keep in mind their payment dates for accommodations, ground transportation, etc. and set student application/payment deadlines accordingly (for example, if you don't have any money in your clearing account then you can't make a payment to go-today travel for your deposit!).
- *Setting program amounts:* We recommend that you split up the Student Program Fee (SPF) to make it easier for students to manage. For example, if your SPF is \$2000, you could require a \$500 non-refundable deposit with the application in December and then have a \$750 first payment in early February and a \$750 March final payment. When talking to students about how to pay for study abroad, sometimes talking to them about *when* they need the money is just as important as talking about *how much* they will need.
- *Collecting program fees:* Please do not accept cash or checks from students. As stated in the budget packet, you will contact Ben Jones in the Business Office to set up a clearing account for your program to collect the student program fees. (Your program proposal must be submitted to OEA and your signed Travel Authorization with cover sheet to OIA before a clearing account can be requested). Students will then make payments directly to that clearing account by way of the cashier window in the Student Services Admin Building. [OEA has created a template of a payment form](#) (you will need to create a payment form for *each* payment) that the students can take with them to the cashier window, make the payment, and bring the stamped form back to you so you can keep track. If you don't know how to use Banner Finance, we recommend that you learn how or know someone who does.
- *Promotional materials:* You will receive an email from OEA about creating promotional materials after your program has received initial approval from OEA/OIA.

- *Pre-approvals:* Please be aware that students MUST request online pre-approval from our office ([Step 4 of the Getting Started section of our website](#)). Technically we prefer that the students complete this process prior to submitting your student application, but simultaneously is fine as well. Our office may deny their request if they do not meet the minimum requirements, so it can be a bit of a risk for students to submit your program application ([Step 5 on our website](#)) prior to the pre-approval request. OEA will provide faculty leaders with an online account in order to check the names, emails, and M#'s of students who have requested pre-approval for their program.

## OCTOBER

• *Recruiting:* Assuming that you submitted your proposal by the deadline, your program proposal has now received OEA/OIA's initial approval and possibly the IEEC final approval by October. You will receive emails to let you know where you are in the process. So, if you haven't already, it's time to begin recruiting! We recommend that faculty leaders promote their program in at least 15-20 classrooms at minimum during the fall semester and 10-15 in the early spring semester. While visiting academically appropriate classrooms is best, *any classroom is useful*. **This is the number one way to recruit students!** Do you want someone from our office to join you? Just email us and we'll do our best! **In addition, [please click here for other tips on how to recruit students for your program](#).**

• *Know your stuff!:* Students will ask you many questions when you begin recruiting and you want to make sure you can answer them! When are the payments due? How much does it cost? How do I apply? If you have determined the items listed in September, then you will be able to answer these questions. We also highly recommend that faculty leaders become familiar with the Steps to Studying Abroad on the [Getting Started section of our website](#) including our deadlines! These steps are obviously for the students, but it is very useful if the faculty leaders understand them as well.

• *New faculty leaders' meeting:* Faculty leading a program for the first time will be invited to attend a meeting led by OEA/OIA to go over all of this information in detail! It is not necessary for reoccurring faculty leaders to attend this meeting as we will send you emails if there are any updates from the previous year, unless they have already been updated in the Faculty Led Handbook.

## NOVEMBER

• *Study Abroad Fair:* The OEA will email you a form to reserve a table (or half a table). We recommend that you bring a fully charged laptop with pictures of your program (or for new program, pics of the area) and any other giveaways or items to encourage students to come to your table and talk about your program.

• *EA Scholarship:* There will be two Education Abroad scholarships for summer programs, which will become available on the Education Abroad website during the month of November. Students should apply online through the Education Abroad website.

## DECEMBER - JANUARY

• *Winter Break:* Faculty leaders should do their best to stay in touch with their current and potential applicants over winter break to keep them excited about the program! This is when social media is very handy. OEA recommends that you lead an Info Session before winter break begins as a final recruiting push. Ideally you will already have your 8-10 non-refundable deposits and can email your students with their acceptance before the break!

## FEBRUARY

- *Is your program running?:* By the end of February, the OEA will contact you and ask if your program is going or “has made” and, if so, to provide your final roster no later than the end of this month or early March. How do you know if your program has made? If you budgeted your program for 8 students and you have 8-10 students who have submitted a non-refundable deposit then you are in good shape (most students will not walk away from a deposit, but just in case, one or two more students than you budgeted for is recommended). If you have the same situation, but the students have submitted the deposit AND a first payment, then you can feel much more certain! *Important: You can NOT rely simply on pre-approval numbers and/or applications without deposits to determine whether or not your program will run. Any student can request pre-approval or sign a piece of paper, but they are not committed to your program until they have submitted a significant non-refundable deposit at minimum.*
- *Acceptance:* It is up to the faculty leader to choose their participants based on the collected applications and to inform the students of their acceptance! Some faculty leaders choose to have very early application deadlines and then choose the ideal number of participants based on the applications they have collected. Other faculty leaders choose to accept students on a first-come, first-served basis. Regardless, faculty leaders are responsible to first make sure the students are pre-approved by OEA and then inform the student of their acceptance and responsibilities. [OEA has created an acceptance email template here should you choose to use it.](#)
- *Pathway Packet:* These are the liability forms that all MTSU OEA participants must complete. The deadline is provided on the [Getting Started](#) and [Events and Deadlines](#) sections of our website. **OEA is tasked by MTSU to collect these forms and we have a very strict deadline for students to submit them.** Only after a program “has made” will the OEA make the online Pathway Packet available to the pre-approved students listed on your confirmed roster. The submission deadline for the Pathway Packet is typically in late March and we want to provide students with four weeks to complete them. The forms are made available in the participant’s online StudioAbroad account, which they created during the pre-approval process. If they haven’t been pre-approved, they will obviously not have access to the forms until they do so (the Pathway Packet deadline remains the same regardless of when a student chooses to request pre-approval). **Students who do not submit the Pathway Packet on time will likely lose their MTSU EA Scholarship and their program participation is in jeopardy as well.**
- *Budget:* If your program has made, then you can feel comfortable making payments from your clearing account to the necessary outside organizations (travel agencies, hotels, bus companies, etc.). How do you make payments out of the clearing account? One way is to receive an invoice and pay using MT Source (your department AA or someone from our office can help you with MT Source if you don’t have access). If the agency/company you want to pay is not yet set up in MT Source, this will take some time so please allow for it. You can also do wire transfers, which Ben Jones can direct you on.

## MARCH

- *Final decisions:* If you haven’t made a determination, you will need to *decide quickly* if your program will be running. Is it on the bubble, meaning really close? **Please let OEA know in early March at the latest if your program has made or if you have chosen to cancel it. We understand this decision can be difficult, but the longer you wait to make this decision the more difficult you are making it for your committed students to plan to their summer study abroad, complete required paperwork by the deadlines, properly prepare, etc. In addition, if you choose to cancel your**



**program in mid-March or later, please be aware that most summer education abroad programs are closed which makes it very challenging for your committed students to find an alternative.**

- *OEA student deadlines:* The most updated dates are listed on the [Getting Started](#) and [Events and Deadlines](#) sections of the OEA website. OEA provides email reminders directly to students (unless they haven't requested pre-approval and we don't know about them!) but we also rely on our faculty leaders to help us remind students of these deadlines.
- *EA Course:* If your program has made, you can work with your department AA and the MTSU Scheduling Office to establish your course in Pipeline so students can register. **OEA will email you the instructions for setting up a study abroad section of your course!** We also suggest that you wait to provide the POD's until the students have submitted all of their program fee payments and their Pathway Packet forms! There is no rush to register for the class as long as they do so by the deadline (which is the end of April).
- *Meetings:* Even before the Mandatory Pre-departure Orientation, you may choose to have a group meeting to go over some of the details of your program – especially academics. Perhaps this is also a good time for everyone to log onto their StudioAbroad account and show you that they have submitted their Pathway Packet forms?

## **APRIL**

- *MANDATORY PRE-DEPARTURE ORIENTATION FOR STUDENTS AND FACULTY:* This is usually a Saturday in April and will be announced as soon as possible in the fall semester. Please put this date in your calendars and encourage your students to do so as well. The VPIA will lead the beginning of the orientation and then the students will meet with their faculty leaders separately. The OEA will provide faculty leaders with a list of the topics to be discussed during the break-out sessions as well as suggestions if requested. *Students cannot study abroad if they do not participate in the orientation.* While we do not advertise it, we do understand that sometimes students have academic conflicts with this date so we offer **one** make-up orientation, which is always the Friday after finals. The make-up orientation is not as comprehensive, and the faculty are not present, so it is only recommended as a last resort. Students must contact OEA first to request permission to attend the make-up orientation. The OEA will then contact the faculty leader and possibly Dr. Schmidt to make this determination.
- *Emergency Protocol meeting:* Meeting led by Dr. David Schmidt to go over emergency guidelines and procedures. The OEA will send an email with date/time closer to the event.

## **MAY – AUGUST**

- *Depart:* OEA will provide you with access to the Emergency Manual. You will also have access to the medical paperwork submitted by your participants in your online account. Paper copies will be made available by request only.
- *Returning:* In August, you will receive emails from OEA regarding student evaluations and returnee conference options.

## Faculty Leaders Timeline for Winter Programs

### AUGUST - JANUARY

- *Program proposal:* After reading the Faculty Led Handbook and meeting with OEA/OIA, faculty leaders should develop the program and complete the program proposal. Please keep in mind that creating the budget can take several weeks to several months, especially if you are not working with one of our affiliates.

### FEBRUARY

- *Program Proposal deadline:* Faculty leaders will submit the MTSU Faculty Led Program Proposal by the February 15<sup>th</sup> deadline (same for both new and reoccurring programs). [After proposal submission, faculty leaders should begin working on the following items as soon as possible.](#)

- *Program Application:* You will create your own Student Program Application. [OEA has a template here if you choose to use it.](#) The Student Program Application will be submitted by the student to the faculty leader, and you will use these applications to choose your participants. Do *not* accept Program Applications without a non-refundable deposit!

- *Setting Deadlines:* Faculty leaders will also set their own student application and payment deadlines. OEA recommends a mid-September student application deadline. If you prefer a later application deadline, it should not be later than mid-October. (Why? Because OEA needs to know your final program decision in late October). In addition, faculty leaders should collect a non-refundable \$500 deposit with the application (without a deposit, it's just a piece of paper!). Faculty leaders should also keep in mind their payment dates for accommodations, ground transportation, etc. and set student application/payment deadlines accordingly (for example, if you don't have any money in your clearing account then you can't make a payment to go-today travel for your deposit!).

- *Setting program amounts:* We recommend that you split up the Student Program Fee (SPF) to make it easier for students to manage. For example, if your SPF is \$2000 maybe you could require a \$500 non-refundable deposit with the application in mid-September and then have a \$750 first payment in mid-October and a \$750 November final payment. When talking to students about how to pay for study abroad, sometimes talking to them about *when* they need the money is just as important as talking about *how much* they will need.

- *Collecting program fees:* Please do not accept cash or checks from students. As stated in the budget packet, you will contact Ben Jones in the Business Office to set up a clearing account for your program to collect the student program fees. (Your program proposal must be submitted to OEA and your signed Travel Authorization to OIA before a clearing account can be requested). Students will then make payments directly to that clearing account by way of the cashier window in the Student Services Admin Building. [OEA has created a template of a payment form](#) (you will need to create a payment form for *each* payment) that the students can take with them to the cashier window, make the payment, and bring the stamped form back to you so you can keep track. If you don't know how to use Banner Finance, we recommend that you learn how or know someone who does.

- *Promotional materials:* You will receive an email from OEA about creating promotional materials after your program has received initial approval from OEA/OIA.

- *Pre-approvals:* Please be aware that students **MUST** request online pre-approval from our office ([Step 4 of the Getting Started section of our website](#)). Technically we prefer that the students complete this process prior to submitting your student application, but simultaneously is fine as well. Our office may deny their request if they do not meet the minimum requirements, so it can be a bit of a risk for students to submit your program application ([Step 5 on our website](#)) prior to the pre-approval request. Beginning in August, OEA will provide faculty leaders with an online account in order to check the names, emails, and M#'s of students who have requested pre-approval for their program.

## **MARCH – APRIL**

- *Recruiting:* We recommend that faculty leaders promote their program in at least 15-20 classrooms at minimum during these months. While visiting academically appropriate classrooms is best, *any classroom is useful*. **This is the number one way to recruit students!** Do you want someone from our office to join you? Just email us and we'll do our best! [In addition, please click here for more tips on recruiting!](#)
- *Know your stuff!:* Students will ask you many questions when you begin recruiting and you want to make sure you can answer them! When are the payments due? How much does it cost? How do I apply? If you have determined the items listed in February, then you will be able to answer these questions. We also highly recommend that faculty leaders become familiar with the Nine Steps to Studying Abroad on the [Getting Started section of our website](#) including our deadlines! These steps are obviously for the students, but it is very useful if the faculty leaders understand them as well.

## **JUNE - AUGUST**

- *Summer months:* It may be challenging to recruit students and collect your applications during these months, but we have a few suggestions for you.
  - Start a social media account, FB/Twitter.
  - Do some classroom presentations in the summer and collect the contact information of interested students. Keep in touch with them throughout the summer with pictures and details about your program so they don't lose interest!
  - Encourage your students to go ahead and request pre-approval on our website! Email them the link so they don't have to find it. It will take our office 5-7 business days to pre-approve them (they receive an email from us after they are pre-approved) and then they can submit your application to you!
  - Send us a pdf of the program application you have created and then we can post it on our website. We recommend that you allow students to apply for your program during the summer, even if they have to come on campus to make the non-refundable deposit.
  - Go ahead and contact [Ben.Jones@mtsu.edu](mailto:Ben.Jones@mtsu.edu) and set up your clearing account. Also create your student payment forms. This way when a student wants to submit an application to you, then you can provide them with the payment form so they can make the deposit into your clearing account.

## **SEPTEMBER**

- *More recruiting:* Now that classes are back in session, it's time for some more presentations! Again, we would recommend that you visit another 15-20 classrooms during this time. In addition, we recommend that you hold an Info Session or set up tables in the student union.
- *EA Scholarship:* The Education Abroad Scholarship will have opened online in July or August and typically has a late September deadline. Students should apply online through the Education Abroad website.

## **OCTOBER**

- *Is your program running?:* In mid-October, the OEA will contact you and ask if your program is going or "has made" and, if so, to provide your final roster. [How do you know if your program has made?](#) If you budgeted your program for 8 students and you have 8-10 students who have submitted a non-refundable deposit then you are in good shape (most students will not walk away from a deposit, but just in case, one or two more students than you budgeted for is recommended). If you have the same situation, but the students have submitted the deposit AND a first payment, then you can feel much more certain! *Important: You can NOT rely simply on pre-approval numbers and/or applications without deposits to determine whether or not your*

program will run. Any student can request pre-approval or sign a piece of paper, but they are not committed to your program until they have submitted a significant non-refundable deposit at minimum.

- **Acceptance:** It is up to the faculty leader to choose their participants based on the collected applications and to inform the students of their acceptance! Some faculty leaders choose to have very early application deadlines and then choose the ideal number of participants based on the applications they have collected. Other faculty leaders choose to accept students on a first-come, first-serve basis. Regardless, faculty leaders are responsible to first make sure the students are pre-approved by OEA and then inform the student of their acceptance and responsibilities. [OEA has created an acceptance email template here should you choose to use it.](#)
- **Budget:** If your program has made, then you can feel comfortable making payments from your clearing account to the necessary outside organizations (travel agencies, hotels, bus companies, etc.). How do you make payments out of the clearing account? Contact Ben Jones in the Business Office for advice.

## NOVEMBER

- **Final decisions:** If you haven't yet determined it, you'll need to *decide quickly* if your program will be running. Is it on the bubble, meaning really close? [Please let OEA in early November at the latest if your program has made or if you have chosen to cancel it.](#) **We understand this decision can be difficult, but the longer you wait to make this decision the more difficult you are making it for your committed students to plan to their winter study abroad, complete paperwork by the deadline, properly prepare, etc. In addition, if you choose to cancel your program in mid-November, please be aware that most winter education abroad programs are closed which makes it very challenging for your committed students to find an alternative.**
- **OEA student deadlines:** The most updated dates are listed on the [Getting Started](#) and [Events and Deadlines](#) sections of the OEA website. OEA provides email reminders directly to students (unless they haven't requested pre-approval and we don't know about them!) but we also rely on our faculty leaders to help us remind students of these deadlines.
- **EA Course:** If your program has made, you can work with your department AA and the MTSU Scheduling Office to establish your spring semester course in Pipeline so students can register. [OEA will email you the instructions for setting up a study abroad section of your course!](#) We also suggest that you wait to provide the POD's until the students have submitted all of their program fee payments and their Pathway Packet forms! There is no rush to register for the class as long as they do so by the deadline.
- **Pathway Packet:** These are the liability forms that all MTSU OEA participants must complete and the deadline is provided on the [Getting Started](#) our website. **OEA is tasked by MTSU to collect these forms and we have a very strict deadline for students to submit them.** If a program "has made", the OEA will make the Pathway Packet available to the pre-approved students listed on your confirmed roster. The submission deadline for the Pathway Packet is typically in mid-November and we want to provide students with enough time to complete them. The forms are made available in the participant's online StudioAbroad account, which they created during the pre-approval process. If they haven't been pre-approved, they will obviously not have access to the forms until they do so (the Pathway Packet deadline remains the same regardless of when a student chooses to request pre-approval). Students who do not submit the Pathway Packet on time will likely lose their MTSU EA Scholarship and their program participation is in jeopardy as well.
- **MANDATORY PRE-DEPARTURE ORIENTATION FOR STUDENTS AND FACULTY: When?** *This is usually an evening in mid-November.* We will lead the beginning of the orientation and then the students will meet with their faculty leaders (you!) separately. OEA will provide faculty leaders with a list of the topics to be discussed during the break-out sessions as well as suggestions if requested. *Students cannot study abroad if they do not participate in the orientation.* While we do not advertise it, we do understand that sometimes students have academic conflicts with this date so we offer **one** make-up orientation, which is always the

Friday after finals. The make-up orientation is not as comprehensive, and the faculty are not present, so it is only recommended as a last resort. Students must contact OEA first to request permission to attend the make-up orientation. The OEA will then contact the faculty leader and possibly Dr. Schmidt to make this determination.

#### **DECEMBER – JANUARY**

- *Depart:* OEA will provide you with access to the Emergency Manual as well as medical paperwork submitted by your participants.
- *Returning:* In January, you will receive emails from OEA regarding student evaluations and returnee conference options.

#### **OTHER:**

- OEA/OIA will provide a new faculty meeting every October. This meeting is focused on summer programs, but winter faculty members are welcome to attend. It is not very useful for upcoming winter programs (running in two months) but would be very useful for those faculty who are planning for the following year.
- OIA provides an emergency protocol meeting every April. This meeting is focused on summer programs, but winter faculty leaders should also attend.