Education Abroad Handbook
MTSU Signature Faculty-Led Programs

Middle Tennessee State University
This handbook includes the policies and procedures pertaining to MTSU Signature Faculty-Led education abroad programs. This handbook was prepared based on 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.

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INTRODUCTION

The Office of Education Abroad (OEA) appreciates your interest in developing an MTSU Signature Study Abroad Program! We look forward to assisting you in what will be a richly rewarding opportunity, for both 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 Signature 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 Signature Study Abroad Program?

They are short-term programs led by MTSU faculty member(s) who teach MTSU courses 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 some language credit programs) and are generally 3-6 credit hours. MTSU Signature programs are typically in the summer term and are usually 2-4 weeks in duration. Faculty can also choose to lead spring break and winter programs.

Developing a Signature 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 Signature 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. This handbook can help guide Faculty Leaders through all aspects of program development and provide assistance in other program areas.
I. KEY STAFF FOR EDUCATION ABROAD

The Vice Provost for International Affairs and Office of Education Abroad staff are available to assist faculty and departments or colleges with study abroad programs through the entire year, including summer months. Office of Education Abroad staff can also assist by putting faculty in touch with others on campus who can answer study abroad questions specifically related to those areas, such as the Office of Financial Aid or the Business Office.

Office of International Affairs

Vice Provost for International Affairs

Campus location: Peck Hall 216

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Office of Education Abroad

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## II. TERMS AND ABBREVIATIONS

| Study Abroad                                      | A course taught outside of the United States and results in progress toward a degree at the student’s home institution.  
This may be a faculty-led program, through a third-party program provider, or through approved MTSU independent study. |
|--------------------------------------------------|-------------------------------------------------------------------------------------------------------------|
| MTSU Signature Program                          | A program led by an MTSU faculty member, sometimes with a co-leader that teaches or supports the program.  
Students will enroll in an MTSU course for this type of program.                                               |
| Consortium Program                               | Collaboration with a university consortium to teach a study abroad course to students from MTSU and students from consortia schools.  CCSA is one example.  
Students will enroll in an MTSU course for this type of program if the course is taught by an MTSU faculty member. |
| Program Provider                                 | Organization that offers study abroad programs to students and often designs custom faculty programs.       |
| OIA                                              | Office of International Affairs                                                                         |
| VPIA                                             | Vice Provost for International Affairs                                                                     |
| OEA                                              | Office of Education Abroad                                                                               |
| IEEC                                             | International Education and Exchange Committee                                                            |
| TA                                               | Travel Authorization                                                                                     |
| TC                                               | Travel Claim                                                                                             |
III. FACULTY POLICIES

Effective June 15, 2017

As these policies are reviewed and 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 pre-departure recommendations when requested.

2. Student Enrollment Requirements

All MTSU Signature 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 Signature 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 Signature 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 Signature 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 will be required.

5. **MTSU Signature Program Proposal Deadlines**

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

6. **MTSU Signature Program Pay Policy**

**Summer Programs:**

a. A faculty member who teaches an education abroad course, which is approved by the VPIA and the IEEC on an MTSU Signature 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) that are set up as “study abroad sections” using the procedures provided by OEA will be eligible towards faculty pay. Only education abroad participants 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 Signature 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 Signature and CCSA courses may be eligible for prorated summer pay and should speak with the VPIA.

**Winter/Other short-term programs:**

Winter, Spring Break, or Fall Break faculty members should speak to the Vice Provost of International Affairs and their Dean regarding pay guidelines.
7. **Family Member/Dependent Attendance**

A successful Signature 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 prohibit 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 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 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.

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

Only full-time tenure track MTSU faculty may lead MTSU Signature Study Abroad Programs. Exceptions can be made with approval of the respective Chair, Dean, Vice Provost for International Affairs, and Provost.

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9. **Housing Arrangements**

Faculty/staff members cannot share accommodations (room and/or apartment) with education abroad participants.
10. **Signature Program Course Set-Up**

Faculty must set up a “study abroad section” of their course(s) with the MTSU Scheduling Office (through the faculty department) using the guidelines provided by OEA. Only course(s) that 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. Each education abroad participant pays these fees directly to the OEA individually when completing the pre-departure packet liability forms.

Faculty may collect program funds for program costs that need to be paid ahead of time or for group activities. Funds may be collected for program vendor payments such as an in-country travel bus or lodging. Faculty should not collect funds for meals or activities that students will pay for out-of-pocket.

12. **Signature Program Cancellation Policy**

If the VPIA determines that a program should be cancelled or terminated due to an emergency or crisis, the process for notification and refunds will be determined by the OIA/OEA.

*State Department Travel Warning or Center for Disease Control Travel Health Warning*

If the U.S. Department of State or the Centers for Disease Control and Prevention (CDC) issue an advisory for the area where an MTSU program is located, the OEA will consult with VPIA.

- Depending upon the severity of the warnings, MTSU will suspend approval of education abroad while the advisory is in effect.
- If MTSU decides to continue the program, 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 Signature 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.
IV. DEVELOPING THE PROGRAM

Faculty leading new programs should expect to begin the development process 16-24 months prior to the program departure date. Program development may involve a visit to the program location, if necessary, and coordination with a custom program provider and/or vendors. Program proposals for the summer are due the previous September 1.

✓ See the MTSU Signature Program Timeline for more information

Faculty Leaders who plan to lead a new program should schedule a meeting with the VPIA and OEA Director, as well as departmental Chair and Dean. Faculty may also want to visit with the Business Office to understand program vendor payments and the program index account, called the EAR fund.

Forum on Education Abroad Standards & Academics

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 on 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 or region 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 Signature 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 contact hours for a six-credit hour program.

- Instructional contact hours may consist 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 2-4 weeks. However, in order to achieve the needed instructional hours, the following program lengths are highly recommended:

  o Three credit hours programs: a minimum of 14 days in duration with a minimum of 12 days in country.
  o Six credit hour programs: a minimum of 28 days in duration with a minimum of 24 days in country.
  o 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.
  o Winter programs can be up to 3 credit hours and the course will be set-up for the MTSU spring semester.

**Departmental Approval and Program Syllabus**

Faculty Leaders should seek the approval of Department Chair and Dean before moving forward with a Signature Program proposal and program logistics. This is to ensure that the proposed course and program support the academic need, structure, and the goals of the department, college, and MTSU.

The Signature Program proposal requires the signatures of Department Chair and Dean.

The course syllabus will be included as part of the program proposal. Each department may have their own syllabus style but the OEA encourages use of a common syllabus template for all Signature Program proposals. A template makes it easier for the VPIA, OEA, and IEEC to review the course within the proposed program.

**Study Abroad Course: Creation & Student Registration**

It is the Faculty Leader's responsibility to ensure the department has approved the course listed on the study abroad program proposal. A study abroad course must be approved prior to submitting the program proposal. Courses that are required for a degree plan, general education courses, and those that are cross-listed or are applicable to many areas of study typically fill well. Those that compete with other study abroad courses offered in the same year may have difficulty filling. OEA does not recommend approval of competing courses (ex: two or three courses offering lower-division Spanish at the same time) unless the department has a great interest among students and the courses are same but the programs are vastly different. As an example, more than one HIST 3075 is often offered but the programs vary: History in Senegal, Imperial London, and Historic Preservation in Scotland.

The course and student registration are the responsibility of faculty and department, as with any other departmental course. Faculty Leaders will provide the course CRN to participants and monitor participant registration.

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. Faculty who wish to create a winter program should check the MTSU Academic Calendar to schedule the return date in time for students to begin their spring semester. All MTSU Signature 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.

Registration is an Office of Education Abroad requirement and directly affects faculty pay.
Enrollment Minimum and Maximum

Beginning in 2015, Signature program courses must have eight (8) MTSU students enrolled in the course to receive full faculty salary/compensation. A prorated salary may be possible if fewer than eight (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 Department Chair and Dean ahead of time to discuss any salary concerns.

If two Faculty Leaders are teaching one course on a study abroad program, a minimum of 16 students must be enrolled for each to receive full pay for the course. Other scenarios are possible, Please contact the VPIA and the Office of Education Abroad for clarification if your program has more than one course or more than one Faculty Leader teaching a course.

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

Program structure

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. Faculty Leaders often select cities they are familiar with, personally or professionally, or where they have professional contacts. The Office of Education Abroad maintains contacts through exchange partners and can provide introductions between contacts and faculty leaders; there is often classroom space or may be housing available on the exchange partner campuses at minimal cost.

Faculty Leaders may want to consult experienced Signature Program faculty to gain insight from various program types and experiences. MTSU faculty have led programs of all kinds, including building a program from scratch and utilizing a custom program provider, and anywhere in-between on that spectrum. The VPIA and OEA staff can provide faculty contact information to those interested in developing a program.

OEA recommends that faculty review budget and finance policies and best practices when constructing a program. For example, making one or two payments to a custom program provider may be easier than making payments to many providers/vendors.

✓ See Appendix A, Budget and Financial Processes for additional information
Coordinating the Logistics

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

Faculty may choose to design a program from scratch on their own or use a third-party provider to assist with logistics. It is highly recommended that faculty leading a program abroad for the first time use a company to coordinate logistics abroad (not just flights) and to provide support while abroad.

Faculty Leaders should consider the following logistics elements when designing a program.

- Travel
- Accommodations
- Activities and Excursions
- Meals

Travel to/from the study abroad location

Group: Many Faculty Leaders opt for group travel since it keep all participants together. Students who do not have much travel experience appreciate the support group travel provides. It can be a bit more expensive than individual travel. Two group travel organizations are included further in this section.

Individual: Faculty also design program with individual participant travel. This is easier for faculty on the front end (less coordination) and may be less expensive for students. Many students like the option of finding a cheaper flight or they may stay after the program ends and travel in the area (so flying home apart from the group is preferred). Participants meet at a specific location abroad on a certain day, coordinated by the Faculty Leader. On the arrival side, however, there is potential for individual flight delays that could affect the start of the program.

Hybrid: A hybrid model finding flights is also one that works. The Faculty Leader meets with program students and each person purchases a flight individually but while in the together in the meeting; a computer lab works well for this. With this model, students will likely be on the same flight but can pay for flights individually. This may be less expensive than a group flight but allows students to fly together. The Faculty Leader must coordinate and plan this meeting in advance.

Faculty must ensure that students have the faculty cell phone number in case there is a delay or separation (if group travel). Students need to ensure their cell phones are on, as well, or they travel with someone who has cell phone service (a buddy from the program).

Travel delays are common. Faculty Leaders should work with the airline and/or travel agency in the event of a delay and communicate with all students when a delay occurs. Faculty Leaders will likely be able to work through alternate arrangements with the airline but can contact the VPIA and OEA if they need additional assistance while abroad.

In-country transportation

- Use of public transportation is a good experience for students to have and can be significantly less expensive than a hired coach or taxi.
- A hired coach is more expensive but allows greater freedom for the group to travel where they need to, when they need to.
- Faculty Leaders can plan their accommodations and site visits around transportation options to maximize efficiency and cost savings.
Accommodations

Faculty Leaders who use a custom program provider or similar company can rely on the provider’s expertise for accommodations. Given the complexities of planning accommodations (and excursions), OEA recommends use of a provider or travel agency for securing inexpensive accommodations. However, other options exist.

Faculty Leaders who opt to create a program on their own have a variety of accommodation options. Some of the most creative are the least expensive. Local hostels, even with private rooms, can be considerably cheaper than hotels. Accommodations at MTSU exchange partners in residence halls may be an option if the program is going to those particular locations. Residence halls may be available at other universities abroad (even those MTSU does not have an agreement with). A mix of hotels and hostels, or hotels and residence halls is a way to keep options affordable. Faculty with connections may have access to homestay options as well.

Airbnb may be an option, but Faculty Leaders must take care to ensure that they understand payment options and cancellations. In one city, MTSU designed a program with affordable university housing for students and an Airbnb for their own accommodations since the university did not offer private rooms (which is highly recommended for each MTSU Faculty Leader on the program, especially since policy does not allow faculty to lodge with students on a program). Faculty who wish to use Airbnb should consult with the VPIA, OEA, and Business Office prior to finalizing the decision or making a deposit.

Before putting down a deposit, Faculty Leaders are encouraged to consult with the VPIA, OEA, and Business Office to understand how (and, if) direct payments can be made to the particular vendor.

Budget for an extra room

The Office of Education Abroad highly recommends that Faculty Leaders budget for an additional room in the program budget to accommodate an imbalance of males/females on the program, or if a participant needs a single room. If a student requests a single room, only that student should pay the additional cost.

✔ See Appendix A for additional budget and finance information for additional information.

Activities and Excursions

Activities and excursions should complement the program academics but also highlight the program location. Many Faculty Leaders design a mix of course-relevant activities and tourist-type activities or excursions. As an example, a business program in London designed with relevant international company visits and lectures on a local university campus might balance this with a visit to Big Ben, the London Eye, or by watching the Changing of the Guard at Buckingham Palace. Many program providers will combine the same type of academic activities and fun activities. Students appreciate the ability to engage culturally as well as academically and it is an important part of the study abroad experience.

Some Faculty Leaders build a list of free-time activities and excursions that students can participate in on their own on free days to give guidance.

Faculty should plan to build student free time into the program. This gives participants and faculty a chance to regroup and have some much-needed space while abroad.

✔ Refer to the Forum on Education Abroad Standards and Academics for additional guidance on contact hours and free time earlier in this document.
Activities can be booked in advance to obtain a group rate or may be required. This is often true of specific tours or museum admissions. Activities on a campus such as reserving classroom space or hiring a guest lecturer will need to be booked and likely paid for in advance. Please pay direct to the vendor via the EAR fund whenever possible. Faculty Leaders should work with the OEA and Business Office to determine the best way to pay a vendor if direct pay is not an option, which is sometimes the case for activities and excursions.

It is easiest if students can pay directly in-country (such as an individual entrance fee with no reservation required) because faculty do not need to collect those funds.

Care should be taken to plan activities (or possible activities) when planning the program so all costs can be built into the program fee. Students will also want to know optional activity costs before committing to the program so they can make an informed decision.

*Guide tips*

Some programs use tour guides. When working with a custom program provider that books a tour with tour guide, Faculty Leaders need to understand ahead of time if recommended tips are included in that cost.

If tips are not included in that cost, Faculty Leaders will need to tell students how much to bring, in cash for tour guide tips or build that cost into the program fee and pay the tour guide directly for the group. If paying for the group, faculty can request the appropriate cash advance from the EAR fund or submit for reimbursement for the tip amount with the travel claim. Tips need to be planned for and included in the initial program budget.

*Meals*

Group meals should be designed thoughtfully with maximum impact considered. Not every meal needs to be a group meal where the faculty coordinates the food eaten and the payment.

- It is easier if many/most meals are those where students choose their own food and pay for it individually.
- Faculty should not collect funds for meals, except for group meals where the faculty will pay the bill.

Student feedback also indicates that culturally relevant meals are appreciated (such as a group meal reflecting traditional or local foods or practices while abroad), as is free time for meals (so students can get whatever they like).
Types of Programs

There are three types of programs available to MTSU faculty who want to lead a study abroad program.

Option 1: MTSU Signature Program (full customization with logistics assistance)

Faculty may use a third-party provider for program creation. Some providers operate solely as travel agents. Others are an extension of current study abroad providers with similar logistics assistance and additional resources abroad. These types of logistics providers are highly recommended for first-time Faculty Leaders.

We recommend that faculty request quotes from more than one logistics or travel provider for adequate comparison of costs and support offered before and while abroad. Faculty should also consider the type of refund/cancellations policies offered.

Faculty retain academic control of the program but receive a great deal of support with arrangements including housing, excursions, group transportation, airport pickup, etc... Custom program providers that are an extension of study abroad programs may also offer classroom space or service-learning projects.

- It is possible the Student Program Fee may be slightly higher by using a logistics provider, but this is not always the case. A higher cost is likely worth the time saved and peace of mind by having one organization and contact responsible for the arrangements.

- This type of program is ideal for faculty who want in-country support and someone to plan the logistics details while they focus on the academics of the program.

- There may be one invoice, which makes it much easier to pay and reconcile after the program ends. Submitting one or two vendor payments for the program is vastly easier than submitting payments to many vendors.

- The expertise of these vendors is also ideal for faculty who are interested in a new study abroad location but do not have as much experience in that location as they would like.

A Note on Contracts

A note on contracts: If a vendor requires a contract for services, faculty must direct the contract to the MTSU Contract Office. Faculty may not agree upon or enter into contracts on behalf of the university. The contracts office is located in Cope, Suite 114, or call (615) 898-2088. See more information here: https://www.mtsu.edu/contract/

✓ A list of program provider and organizations follows.
Go-Today Travel

Go-Today is a travel/tour organization with a team that specializes in group travel. They also have experience working with higher education institutions so they understand faculty and education abroad needs well.

Go-Today offers customized programs that include daily activities, lodging, transportation, some meals, and admission tickets for activities in the itinerary, guides, etc... that can be as detailed as the faculty needs.

- Link: Go-Today Travel Educational Groups
- Link: Sample Program Itinerary
- Email: newgroups@go-today.com
- 1-800-290-6685

WorldStrides Custom Programs

WorldStrides offers “built-from-scratch international experiences” in over 110 countries. They offer logistics and professional partners (speakers, companies, organizations) to complement faculty academics.

WorldStrides is the umbrella company over ISA and Veritas, affiliated study abroad provider programs with short-term or long-term options we offer to MTSU students.

- Link: WorldStrides Education Abroad
- Link: WorldStrides Higher Ed Custom Programs
- Contact: Michele Monroe (undergraduate programs)
- Contact: Daniel Cutright (graduate programs)

IES Custom Faculty Programs

IES offers short-term programs in or near IES Abroad study abroad locations or multi-city destinations. They maintain on-the-ground IES Abroad Centers and staff in more than 30 cities to provide additional program support.

Faculty can create a fully customized program or select from IES Abroad or partner institution courses. Program options include housing, internships and service learning, and local university partners.

- Link: IES Customized and Faculty-Led Programs

CIEE (Council on International Education Exchange)

CIEE offers customized faculty programs at over 50+ CIEE sites in over 38 countries to enhance your academic programs. They offer fully custom programs, partnered programs with pre-planned itineraries and activities to complement the academics, and specific business faculty-led programs. CIEE is an affiliated study abroad provider to MTSU students with short or long-term options. They offer great in-country support, site visits, guest lectures, and full logistical support.

- Link: CIEE Faculty-Led and Custom Programs
- Contact: custom@ciee.org
Anglo Educational Services (AES)

Anglo Educational Services offers customized programs in the UK and Europe. Programs are tailor-made to complement the academics of the program. They provide accommodations and study space in central London (owned by the company), offer a particular focus on London and Manchester, and offer logistics and services in all locations.

- Link: [Anglo Educational Services](#)
- Contact: [Emma Coelho](#)

CEPA – Customized Educational Programs Abroad

CEPA offers customized programs in a wide variety of locations. Faculty retain the academic portion of the program and CEPA provides guided visits, professional excursions, accommodations, some meals, and logistics, depending on how the program is constructed.

- Link: [CEPA](#)
- Contact: [Lena Diepenbrock](#)
- Contact: [Celen Pfahl](#)

Other customized program providers are available and faculty are not limited to those listed above. Please contact the Office of Education Abroad to discuss other options.

As with individual vendors, custom-program providers will have specific payment deadlines and may have penalties for changing program participant numbers at the last minute. Faculty should read their program details carefully, ensure they understand cancellation and change policies and construct a program with this information in mind.
Option 2. MTSU faculty-designed programs (no third-party organization)

Faculty can choose to arrange all logistics on their own. 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. This is an option recommended only for experienced study abroad faculty leaders.

Faculty who choose to go this route should set up an appointment with the VPIA, OEA, and the Business Office far in advance of the proposal deadline AND consider using a travel agency familiar with group and/or student travel to help in some way, such as in-country travel or a group flight.

Two group flight options are below.

**Student Universe**

Student Universe is a travel/tour organization that has a team specializing in group travel. They also have experience working with higher education institutions. They offer group travel options for 10 or more students.

Student Universe offers group flight assistance. The Faculty Leader will make other program logistical decisions and plans.

- Link: [Student Universe Group Travel](#)
- Link: [Student Universe – Why Book with Us?](#)

**Travelennium**

Travelennium is the contracted travel provider for MTSU. They can coordinate individual or group travel for programs abroad. Payments to Travelennium are directly via the program EAR fund, which can eliminate some vendor payment confusion. The Faculty Leader will make other program logistical decisions and plans.

- Link: [Travelennium](#)
- Contact: [Peggy Robinson, Travelennium Representative](#)

We recommend that faculty consult with MTSU Faculty Leaders who have led 100% faculty-developed programs in recent years to understand the process, pros, and cons of this type of program.
Option 3. MTSU Consortia-Led program:

Faculty Leaders may also choose to apply to teach on an affiliated consortia program. The advantages of a consortia program include program logistics, support while abroad, and access to a greater number of students that can participate in the 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:

- Submit a copy of the consortia program proposal to MTSU
- Receive approval of department and college
- Receive approval from the Vice Provost for International Affairs

CCSA (Cooperative Center for Study Abroad)

CCSA offers summer and winter break programs. Faculty can draw from consortia schools for enrollment in the course, including MTSU. MTSU faculty experienced with CCSA are available for guidance and Faculty Leader are encouraged to discuss opportunities with Scott Boyd, the CCSA MTSU representative (information below).

CCSA has their own faculty program application. Faculty may submit this in lieu of the MTSU Signature Program Proposal application materials.

Contacts:

- Scott Boyd (CCSA MTSU faculty representative)
- Jerry Barnaby

Please note: MTSU does not affiliate with any other consortia programs at this time. This section will be updated if/when this changes.
**Budget & Financial**

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. Faculty determine the program budget when building the program. The budget spreadsheet is submitted with the program proposal and support the information listed on the Travel Authorization. Faculty Leaders teaching on a consortium program follow the budget determined by the consortium.

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. Faculty who choose not to work with an OEA affiliate to develop the program *will be fully responsible for understanding all aspects of the program and outside vendor policies.*

Attention to vendor payment deadlines and cancellation/refund policies is also important and can affect recruiting students, program viability (payments due too early in the process may mean shorter recruiting time), or refunds if the program does not make.

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.

To pay vendors, Faculty Leaders will work with their department Coordinator, Executive Aide, or other staff member who can enter invoices and payments into the MT$ource system. Faculty are responsible for keeping a record of student deposits and payments and may work with department staff for assistance. The Office of Education Abroad is not responsible for keeping track of program payments or paying vendors.

A sample budget and interactive spreadsheet are available in the Faculty section of the OEA website or by contacting the Director of the Office of Education Abroad.

**Travel Authorization & Travel Memo, Travel Claim**

The Travel Authorization (TA) and travel memo are required documents and reflect program budget amounts.

- The Travel Authorization is based on group costs, not individual faculty costs for the program.
- The Travel Memo is signed by the Department Chair, Dean, University Provost, and University President.
- The Travel Authorization is signed by the Department Chair, Dean, and the Vice Provost for International Affairs.
- The Travel Authorization and Travel Memo are submitted together.

OEA recommends submitting the TA and Travel Memo with the program proposal, if possible. This helps expedite the EAR index process so students can begin making program payments. With TA approval, the Business Office will open an EAR index for the program so students can make program deposits and payments.
Upon completion of the program, faculty will submit a Travel Claim (TC) to reconcile all program costs and reference the TA in this process.

Each program will have one Travel Authorization and one Travel Memo. This is true even if faculty combine logistics and programs travel together. Faculty are responsible for their own program payments and travel documentation. Following the program, each program will have a related Travel Claim. Collaborative programs – those with the same logistics and vendors but different courses and Faculty Leaders – will each have a TA, Travel Memo, and TC. Faculty in collaborative programs may want to consult with the VIPA, the OEA Director, and the Business Office for assistance.

Cell Phones

OEA/OIA requires cell phone access to all Faculty Leaders for the duration of the program. Cell phone cost can be included in the proposal budget spreadsheet in the Faculty Expenses section.

Below are some suggestions:

1. Contact your personal cell phone company to purchase international service. Most major carriers offer daily or monthly data plans.
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 a cell phone may be provided.

Faculty should be aware of the multi-factor authentication needed to access MTSU email and for logging into MTSU accounts. MTSU ITD recommends the Microsoft Authentication app; it can be downloaded from your app store. For more information, please contact ITD directly or see the information on the ITD website, linked below.

- Link: MTSU ITD Multi-factor Authentication

Emergency Costs

OEA highly recommends the addition of emergency costs on a program budget. Emergency funds are important and are used by faculty on study abroad programs for student illness, missed transportation, unexpected activity costs, for costs related to flight layovers or cancellations, and for inconveniences such as lost luggage or lost/stolen student wallets.

Adding emergency costs to the program budget is especially important for faculty who design a program without using a custom program provider since program providers tend to offer more in-country support.

✔ See Appendix A for more information on program budgets and financial information.
V. PROGRAM PROPOSAL

After determining the type of program, faculty should begin working on the program proposal. Proposal documents are available on the MTSU Office of Education Abroad website in the Faculty section and by contacting the Office of Education Abroad.

Proposal Deadlines

- Summer programs = September 1
- Winter break programs = February 15

Program proposals should be as detailed as possible and include:

- All sections completed, including the signatures of Department Chair and Dean
- Editable budget spreadsheet
- Course syllabus
- Program itinerary with information on contact hours
- Faculty CV or résumé (for new proposals, not required for recurring programs)
- Other documents that support the proposal

The Vice Provost for International Affairs, Office of Education Abroad, and the International Education and Exchange Committee (IEEC) review all program proposals and all proposals 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.

The MTSU Signature Program Proposal (or program renewal for recurring programs) must be submitted each time a program runs. Approval is only per term, not program.

Consortia-led programs (CCSA)

Faculty leading a program through CCSA must submit an application to CCSA and submit a copy of that application, along with CCSA approval, to the Office of Education Abroad and the Office of International Affairs. Faculty leading a program through CCSA must also have the program approved by their department.

The deadline for CCSA proposals is the same as other MTSU programs.
VI. AFTER APPROVAL: THE APPLICATION PROCESS

The Office of Education Abroad will convert approved program proposals into interactive web pages on the OEA website. Students will have a chance to review all program information, view previous year program photos or videos or read student testimonials (if recurring), and can apply for preapproval on the website.

The Office of Education Abroad Director will email Faculty Leaders and co-leaders with approval and the web page link and information to move forward in the application process. The Office of Education Abroad Advisor will email separately to discuss marketing the program.

✓ See more information in Section VII. ‘After Approval: Marketing & Recruitment’ further in this document.

Student Application Process

OEA Preapproval

Students are required to apply for preapproval with the Office of Education Abroad for all study abroad programs. Faculty programs will have their own web page on the OEA website, and students will apply for approval directly from that page.

Students must complete preapproval to move forward in the study abroad process. Students may not participate on a study abroad program if they do not complete preapproval and if they have not completed all OEA requirements.

The OEA will assist students through the entire OEA application process. The OEA highly encourages Faculty Leaders to become familiar with the basics of this process to advise their program participants. The Getting Started and How to Apply sections of the Office of Education Abroad website outline the steps to studying abroad for students. OEA staff updates these sections regularly.

- Link: Office of Education Abroad – Getting Started
- Link: Office of Education Abroad – How to Apply

Students must meet minimum requirements to participate on MTSU study abroad programs. These requirements are on the OEA website, linked below.

When OEA advisors review preapproval applications, overall combined GPA is the basis for initial preapproval. OEA staff may review other requirements later in the process to ensure students are and remain qualified to participate. If a student does not meet the OEA GPA requirement but is close to that requirement, an OEA advisor may email the Faculty Leader to ask if they would like to make an exception.

OEA advisors do not review individual program requirements determined by a faculty leader such as a higher GPA or prerequisite requirement. Faculty are encouraged to review and vet students to ensure they meet specific course requirements.

- Link: Office of Education Abroad – Policies and Requirements

Faculty are encouraged to remind students of the importance of contacting the Office of Education Abroad to ask about the process, requirements, and all other aspects of study abroad.
Faculty Approval of Participants

In addition to OEA preapproval, faculty may vet and approve students who participate on their program and may select program requirements that exceed OEA minimum requirements.

It is highly recommended that faculty have an application for the program with questions designed to find participants that best meet the requirements for the program. Program applications also help faculty determine who is serious about participating and who is not.

✔ See the section below titled ‘Selecting Program Participants’ for more details.

Transient or Non-Degree Seeking Student Approval

Transient or Non-Degree Seeking Students may participate on MTSU Signature study abroad programs. Students must meet all Office of Education Abroad requirements with no exceptions, including registration as an MTSU student, preapproval, registration for the course, and orientation & completing pre-departure materials.

This is a good option for current MTSU students who would like to participate on a faculty summer program but will graduate before the program begins. Students may re-enroll to MTSU for the summer term to participate. Office of Education Abroad staff can guide the student through this easy process. This is also a good option for students who are out of state or those who come home to Middle Tennessee and want to earn credit on the faculty program during the summer term.

In most cases, transient or non-degree seeking students will not qualify for Office of Education Abroad scholarships.

Selecting Student Participants

As mentioned, students must meet minimum requirements to participate on MTSU study abroad programs. These requirements are on the OEA website.

OEA advisors do not review individual program requirements determined by a Faculty Leader. For example, OEA requires a 2.0 overall combined GPA for participation on a summer study abroad program. If the faculty member requires a 3.0 GPA for his/her program instead, it will be up to him/her to review and select participants academically qualified at the higher GPA.

Faculty may vet student applicants by GPA, pre-requisites, major or minor, applicant academic/personal goals, or other relevant factors. Faculty Leaders may also decide to require a reference, on-campus interview, or other criteria for acceptance into their program. Faculty should keep in mind MTSU non-discriminatory policies when creating program requirements and application materials.

Faculty should clearly communicate program criteria in the program proposal and to all students at the time of application.

Examples of past faculty program applications are available upon request from the Director of the Office of Education Abroad.

It is the Faculty Leader's responsibility to:

- Create a program application,
- Determine the criteria for selection,
• Inform participants of their acceptance, and
• Provide the final list to the OEA at the appropriate time

✓ See the MTSU Signature Program Timeline for more information.

• Link: Office of Education Abroad - Faculty

**Program Deposits and Payments**

Most programs will require student deposits and payments into an EAR index account (also called EAR fund). The EAR fund opens once the program, Travel Authorization, and Travel Memo have approval. The Business Office will email faculty when their EAR fund has been created (or opened for recurring programs).

Faculty can require any program payment schedule they prefer. OEA recommends the payment schedule follow the vendor deposit schedule to ensure there is enough money in the EAR fund to pay the vendor(s) deposit(s). For summer programs, this usually means an initial non-refundable deposit, a payment before the end of the fall term, and a final payment early in the spring term. Breaking the payments into manageable amounts helps students stay on track. When talking with students about how to pay for study abroad, sometimes talking to them about when they need money is just as important as talking about how much they will need (and when).

OEA recommends a non-refundable program deposit. A non-refundable deposit helps weed out students who are not committed and can tie-in with the Office of Education Abroad Commitment Scholarship.

Aside from program deposit, the first program payment should be due before the end of the fall semester. This could be directly after the winter break/Thanksgiving holiday but before finals. A sample schedule could be the non-refundable deposit due by December 1, the second payment

Faculty Leaders are fully responsible for keeping track of program payments and are responsible for any student refunds, if necessary. This is often in collaboration with department staff who handle budget items like purchasing, payment authorizations, or work in MT$ource.

✓ See more information on program deposits and payments in the budget and financial document in Appendix A.

**Final Participant List**

The Office of Education Abroad will request a final participant list from Faculty Leaders to ensure participants on the list match program preapprovals. This occurs later in the process, for summer programs, usually around February or March to coincide with the close of the summer OEA application cycle.

The final participant should have the student name and the course registration information for each.

**Course Registration**

The course and student registration are the responsibility of the Faculty Leader and department, as with any other departmental course. Faculty are responsible for giving the CRN to students and keeping up with their registration in the course.

Registration is an Office of Education Abroad requirement and directly affects faculty pay.
VII. AFTER APPROVAL: MARKETING AND RECRUITMENT

While the OIA and OEA will provide assistance and resources, Faculty Leaders are ultimately responsible for promoting and recruiting students for their programs.

Recruiting

Recruiting is essential to finding interested students and filling a program. A guide called Tips for Recruiting is included on the Faculty section of the OEA website. Information can also be found in the MTSU Signature Program Timeline.

Recruiting can include classroom presentations, printed marketing materials, online marketing materials, information sessions, use of OEA student volunteers (Global Ambassadors), contacting interested students via email, holding information sessions (either in-person or via Zoom), working with the department to promote the program, and more. Faculty who do well with recruiting have most often created relationships with students. Students are more apt to follow faculty they know or those that take time to explain the program and program benefits to them. If face-to-face recruiting is not possible, a PowerPoint or short, recorded presentation can be helpful.

The Office of Education Abroad holds an annual Study Abroad Fair in November. Faculty are encouraged to participate to highlight their program for recruitment. Faculty who are unable to attend can have a table at the fair that OEA Global Ambassadors or student volunteers watch over.

Marketing Materials & Marketing Budget

The Office of International Affairs will assist with the cost of printed materials up to a specified amount. Please check with the OIA and/or OEA to determine the amount available for the current fiscal year and the process for using the funds. Faculty Leaders whose program proposal has received initial approval by the VPIA will receive an email from OEA about marketing.

All marketing materials using OIA funds will go through the OEA for review and ordering. There are no exceptions to this policy.

A portion of the materials ordered will go to filling OEA campus displays and sharing with students in OEA campus events such as tabling, advising, etc...

OEA staff can assist with creation and promotion of all Signature Study Abroad Programs to the extent possible. This may include the creation of flyers, rack cards, posters, yard signs, and social media materials. There are specific requirements for marketing materials that faculty and OEA must follow including use of non-discrimination statements, use of the MTSU WordMark, and how materials are printed. Faculty must agree to these requirements when working with OEA staff for marketing materials and respect any related constraints OEA staff have when creating marketing materials.

Faculty are welcome to create their own marketing materials and should follow the same MTSU marketing requirements when doing so.

- Faculty Leaders who create their own materials can send them to the OEA Advisor for review and submission to Printing Services.
- Faculty Leaders may not send their own marketing materials to Printing Services if they want to use the OIA marketing funds.
We recommend that faculty take advantage of social media platforms such as Instagram and Facebook to share program information since those platforms are free.

Global Ambassadors are study abroad alumni that volunteer their time with the Office of Education Abroad. They can assist with marketing programs via campus tabling or other ways of program promotion. Global Ambassadors are often students who have studied on Signature Programs so they can share their personal experiences and excitement with other students as they promote a program. Contact the Office of Education Abroad Advisor for more information.

**Classroom Presentations**

The Office of Education Abroad uses classroom presentations to share general study abroad information. Faculty Leaders may want to consider a similar approach. Something as short as 5-10 minutes in a classroom (the faculty classroom or others) can have a positive impact on recruiting.

An overview of the program, the course, the itinerary including activities and academics, the cost, photos (if recurring), and available scholarships is a good start. If you would like assistance with a classroom presentation, OEA staff can join you to share the basic study abroad process, promote scholarships for your program, and more.
VIII. OFFICE OF EDUCATION ABROAD STUDENT SUPPORT & REQUIREMENTS

It is important that Faculty Leaders have a basic overview of the OEA student support and requirements for study abroad. The student study abroad requirements are below.

Preapproval and Study Abroad Process

1. Preapproval
   - Students must apply for preapproval on the OEA website.
   - Quick, online process
   - Occurs early in the study abroad process by the deadline
   - No action by Faculty Leader is required

2. Pre-departure packet
   - Released about 3-4 weeks prior to the packet deadline, typically in March for summer programs
   - Released only to students on the final participant list as provided by the Faculty Leader and those who have also completed preapproval
   - Risk management and health & safety requirements
   - Two payments: $50 Education Abroad fee and $33 iNext insurance fee
   - Action required by Faculty Leader = provide OEA with final participant list

3. Course registration
   - OEA will monitor the program course registration in additional to the Faculty Leader monitoring course registration
   - Action required by Faculty Leader = provide registration information to students, provide the CRN and course information to OEA, monitor registration in the course

4. Pre-departure orientation
   - Mandatory
   - OEA will provide information on risk management, health & safety, and more
   - Faculty Leaders will meet with their participants separately, typically directly after the orientation, in 'break-out sessions' to discuss information more specific to each program
   - Action required by Faculty Leader = attend orientation, prepare specific orientation for your program for program break-out session

In addition to these steps, students will concurrently apply to the program with the Faculty Leader, make program payments, work with their academic advisor to ensure the course is appropriate for the degree plan, consult with the Office of Financial Aid, and apply for scholarships.
**Scholarships & Financial Aid**

The Office of Education Abroad provides advising & guidance for programs and study abroad scholarships.

Institutional scholarships for study abroad include the Office of Education Abroad Commitment Scholarship, Office of Education Abroad Scholarship, Media Scholarship, Honors College Study Abroad Scholarship, Jones College of Business Scholarship, and more.

Outside scholarships are available to students as well.

Financial aid often applies to study abroad programs. Student must choose a program/course that meets degree requirements. Summer minimum credit hours apply. Students are highly encouraged to work with the Office of Financial Aid to understand their aid options.

- Link: [Office of Education Abroad, Financial Aid](#)
- Link: [Office of Education Abroad Scholarships](#)

**Tuition Discount**

Students participating on summer Signature Faculty-Led Programs will receive a 25% tuition discount by the university.

The discount will not be automatic when students register for the course. OEA staff will coordinate the tuition discount with the Business Office at the appropriate time.

The tuition discount is not available for any other program or term. Annual renewal of the discount is not guaranteed. The OEA or the VIPA will let Faculty Leaders know if there is a change in the discount.
IX. RISK MANAGEMENT, INSURANCE, HEALTH & SAFETY

All Faculty Leaders will work with the VIPA and the OEA for risk management of a program. The OIA follows all MTSU risk management decisions including individual program decisions made by MTSU Legal Counsel and those made by the university large-scale risk events, such as a pandemic.

Based on a variety of factors, MTSU administration may decide to cancel a study abroad program at any time if the risk is unacceptable.

Risk Advisory Levels

The OIA and OEA regularly monitor two advisory levels to monitor risk worldwide: Centers for Disease Control and Prevention (CDC) health advisory and the U.S. Department of State travel advisory. Advisory level review is at the time of program proposal and during the year leading up to studying abroad.

If levels are unacceptable 30-days prior to the program start date, MTSU may cancel the program.

A program proposal will not be approved if the study abroad location is at an unacceptable advisory levels when the proposal is submitted (hoping that the advisory level will improve). There must be acceptable advisory levels at the time of submission.

Centers for Disease Control and Prevention (CDC)

- ‘Where are you going?’ drop-down menu, select the country
- Level 1 is acceptable. Levels 2 & 3 are unacceptable

U.S. Department of State

- ‘Learn about your destination’ box, enter the country
- Levels 1 & 2 are acceptable. Levels 3 & 4 are unacceptable (no exceptions).
- https://travel.state.gov/content/travel/en/traveladvisories/traveladvisories.html/

Emergency Protocols Meeting

The Vice Provost for International Affairs will lead an annual required meeting detailing emergency protocols in April. Faculty Leaders will receive an email invitation to the meeting.

OEA Emergency Response Manual (Director’s Notebook)

The MTSU OEA Emergency Response Manual (often called the Director’s Notebook) is emailed to each Faculty Leader about 3-4 weeks prior to program departure. The notebook contains an emergency response tree, student participant information (such as a copy of the passport, student itineraries, student health information, etc...) and other relevant student information.
Preparing for Risk: Advice for Students

The Office of Education Abroad orientation covers basic risk management information that is applicable to all study locations. Information covered includes: knowledge of the emergency number in the country abroad (the equivalent of 911), knowledge of U.S. Consulate or Embassy location, being aware on public transportation, information about differences in rights or laws in other countries, suggestions for safely carrying money abroad, health advice, an emergency phone tree, and more. OEA also provides each student with country-specific basic information and CDC information at the required orientation. A copy of the orientation is available upon request.

Faculty Leaders should complement OEA orientation material by preparing students for the specific location. This should include the program expectations and rules as well as information on laws and rights, traffic or individual safety in the specific location, personal safety, and more.

Students should have direct contact information for each faculty member or co-leader on the program such as a cell phone number. Students should provide Faculty Leaders with their contact information as well.

Pre-Departure Orientation

A pre-departure orientation is a required part of all education abroad programs, including MTSU Signature programs, for both students and Faculty Leaders. OEA coordinates this meeting and provides Faculty Leaders with the date and time several months in advance.

Students receive orientation information and deadlines multiple times from the Office of Education Abroad throughout the study abroad process. They are shared during study abroad advising and on the OEA website.

OEA/OIA will lead the beginning health and safety section of the orientation meeting then Faculty Leaders will lead their breakout sessions to discuss various topics including budgeting, culture, behavioral expectations, packing, etc.

- Breakout sessions are usually located in campus classrooms.
- OEA staff will coordinate breakout rooms with Faculty Leaders in the month prior to orientation.

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 Faculty Leader breakout sessions closer to the time of the orientation.

Consortia-Led programs: Students and Faculty Leaders with CCSA should attend/participate in the MTSU orientation mentioned above.

- Link: Office of Education Abroad Dates and Deadlines
**Health Insurance**

All MTSU education abroad participants and Faculty Leaders will be enrolled in the iNext basic supplemental plan to meet MTSU requirements. Student participants will pay this fee ($33) to the OEA as part of the required liability documentation (Pre-Departure 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 supplemental coverage only) for faculty who are teaching a course only.

There is a spot for the health insurance cost on the program budget spreadsheet. Faculty teaching the course can enter zero in this space or leave it blank in the faculty costs section. The health insurance cost will be automatically included in the student costs section.

Faculty who would like to review the iNext policy can do so through the link below.

- Link: iNext Insurance Plans

**Other Insurance**

OEA highly recommends that students and Faculty Leaders consider flight insurance and trip cancellation ‘for any reason’ insurance to help mitigate loss in the event that a program should cancel at the last minute or while abroad.

We recommend:

- Reviewing the coverage carefully to ensure it meets each student/Faculty Leader needs
- Reviewing coverage to find what IS NOT covered, like ‘acts of God’, and asking the airline or company if the insurance covers cancellations or losses related to pandemics like COVID-19.

The OIA and OEA do not cover additional insurance costs.

**Faculty Abroad Check-in**

The OIA requires that all faculty leading programs abroad check-in with the VPIA or OEA once they arrive safely abroad with students (if group travel), or safely abroad and all students have arrived and the group is together (if individual travel). This gives peace of mind to the OIA and gives faculty a chance to ask any last minute questions, if needed, before the program begins.
X. SIGNATURE PROGRAM RESOURCES

In order to assist Faculty Leaders through the education abroad process, the Office of Education Abroad has a section dedicated to faculty resources on the OEA website. See the link below.

Resources available include:

- A detailed program timeline
- Support and guidance from experienced Faculty Leaders
- Templates for student program payments
- Sample student program applications from current and former MTSU Faculty Leaders
- OEA orientation materials
- Sample program budget sheets and overall program cost estimate examples
- Examples of previous marketing materials, and access to the OEA marketing resources

The OEA updates the faculty section of the OEA website regularly. If you do not see the materials you need, please contact the OEA for assistance.

- Link: Office of Education Abroad Faculty
Budget and Financial Processes

How to develop a budget for MTSU Signature Programs

Financial Processes for MTSU Signature Programs
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I. DEFINITION OF COSTS AND FEES

All MTSU Signature education abroad programs are wholly self-supporting. All costs of offering the program are covered by the program fee charged to the participating students, including 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.

✔ Refer to the program budget spreadsheet and the program application, budget page, to see how these terms fit into the budget.

**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.

**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 is typically rolled into the Student Program Fee. It may also be supplemented by the academic department, the OIA, or even out-of-pocket. It is up to the Faculty Leader to determine how their FOC will be covered.

The FOC is divided evenly by all students participating on the program as indicated in the number of undergraduate and graduate students listed on the budget spreadsheet.

The budget spreadsheet will automatically calculate the FOC using the number of students entered on the spreadsheet. Faculty leaders do not need to manually make this change.

Faculty using program providers may find that the FOC changes (lowers or disappears) as student enrollment in the program increases. Some providers include a certain number of “free” faculty spots per x-number of students enrolled in the program. In these circumstances, faculty should include this information in the faculty 'notes' sections of the budget spreadsheet. If faculty or student program costs decrease as more participants commit to the program, accommodations can be made to account for this (such as a lower final student program payment).

Only additional costs not covered by the program provider – such as additional meals, cell phones, tips for guides, etc... – should be included in the FOC.

*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. See the Faculty Handbook policies section for more information.*
Spreadsheet Guidance – Faculty Overall Cost Section

In any section, if using a program provider for logistics and any items are included in a total program cost per faculty leader, faculty should list those items, list the cost as $0.00, and make a note indicating that the item is included in the program provider fee.

Other items not included can also be itemized in this section as shown in the spreadsheet below.

Itemizing in this way makes it very clear for the OEA, proposal reviewers, and students.

Examples below: The faculty leader is using WorldStrides/ISA for a custom program. The program cost per faculty leader includes lodging, some meals, and some excursions. Some meals are not included in the program fee.

<table>
<thead>
<tr>
<th>Faculty - Lodging &amp; Meals</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Hotel accommodations</td>
<td>$0</td>
<td>Included in WorldStrides program fee. Faculty have individual rooms, 4 nights.</td>
</tr>
<tr>
<td>London</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Breakfast, lunch</td>
<td>$0</td>
<td>Included in program fee, all days</td>
</tr>
<tr>
<td>Dinner</td>
<td>$300</td>
<td>Est. for dinner, not included in WorldStrides program fee.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Faculty - Entrance Fees, Excursions, and Cultural Activities</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Cultural heritage center</td>
<td>$0</td>
<td>Included in WorldStrides program fee</td>
</tr>
<tr>
<td>Zoology excursion</td>
<td>$0</td>
<td>Included</td>
</tr>
<tr>
<td>Business networking with three international companies</td>
<td>$0</td>
<td>Included</td>
</tr>
<tr>
<td>Pirate museum</td>
<td>$12</td>
<td>Not included in program fee</td>
</tr>
</tbody>
</table>

✔ See the related information titled *Lump-sum faculty program cost* further in this section.

Additional guidance for this section

- If any item is included in the program cost, list $0.00 in the corresponding cost cell of the spreadsheet and include a note (such as “included in program for faculty”).
- Always include notes. Ex: “Using Expedia for flight” or “Two nights lodging at the Radisson Hotel in London before going to the hostel”
- Itemize all sections thoroughly. Add more lines if needed.
- Do not forget to list cell phone cost. This is the additional cost of using a cell phone while abroad.
- Do not forget to enter emergency costs (per faculty). Emergency costs are for items including unexpected costs while traveling, emergency or medical costs that insurance will not cover, changes in exchange rates, or unexpected student costs that come up from time to time.
Group costs

Faculty who have a group cost like group museum tickets or group transportation can include those costs in the faculty section. The cost will be divided by the number of students on the spreadsheet.

- Ex: Louvre tickets are cheaper to purchase as a group, paid ahead of time or paid by the faculty on-site as one payment.
- Faculty adds this total cost to the faculty Entrance Fees, Excursions, Cultural Activities section.
- Faculty might pay for this via: purchase order with MT$ource, cash advance from EAR fund, or pay and get reimbursed from the EAR fund after the program.
- See spreadsheet example below.

<table>
<thead>
<tr>
<th>Faculty - Entrance Fees, Excursions, Cultural Activities</th>
</tr>
</thead>
<tbody>
<tr>
<td>Louvre group discount – tickets for group</td>
</tr>
<tr>
<td>$140</td>
</tr>
<tr>
<td>Includes tickets for 8 students and one faculty member at</td>
</tr>
<tr>
<td>advance group purchase price, discount of 25% included</td>
</tr>
</tbody>
</table>

Lump-sum faculty program cost

- Faculty who have a lump-sum faculty program cost that includes most or all faculty expenses will include this amount in the ‘Additional items to be included in total’ section and add detailed notes.
  - In other sections, for these items that are included, (airfare, lodging, etc..) the amount would be $0.00
  - It does not have to be fully itemized, but it should explain the basics of what is included.
- See spreadsheet example below.

<table>
<thead>
<tr>
<th>Faculty - Additional items to be included in total</th>
</tr>
</thead>
<tbody>
<tr>
<td>WorldStrides /ISA custom program cost (per faculty)</td>
</tr>
<tr>
<td>Includes faculty accommodations in both cities, 2 meals per day, fancy snacks, entrance fees &amp; activities listed on itinerary, tour guide, faculty emergency notebook, transportation to/from airport in London and Dakar.</td>
</tr>
</tbody>
</table>

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. This amount will be divided by the number of the students on the budget spreadsheet.
**Student Program Fee (SPF)**

The most important thing to remember about this section: This is the amount that the Faculty Leader collects from the students using the program EAR fund 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, group meals, and the Faculty Expenses (FE).

In any section, if the items are included in a total program cost per student, the faculty leader should list those items, list the cost as $0.00, and make a note indicating that the item is included in the program provider fee.

**Spreadsheet Guidance: Student Program Fee section**

In any section, if using a program provider for logistics and any items are included in a total program cost per student, faculty should list those items, list the cost as $0.00, and make a note indicating that the item is included in the program provider fee.

**Important:** Other items not included in a total program cost per student will be itemized in a separate student costs section. Why? Including them in this section would mean the faculty leader is collecting those funds, which is incorrect.

Ex: The faculty leader is using WorldStrides/ISA for a custom program. The program cost per student includes lodging, some meals, and some excursions. The faculty leader will collect these funds.

Itemizing in this way makes it very clear for the OEA, proposal reviewers, and students.

✔️ See the example and information under *Student Overall Cost* to account for costs students will pay on their own.

**Examples**

<table>
<thead>
<tr>
<th>Student - Lodging &amp; Meals</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Hotel accommodations</td>
<td>$0</td>
</tr>
<tr>
<td>London</td>
<td></td>
</tr>
<tr>
<td>Breakfast, lunch</td>
<td>$0</td>
</tr>
</tbody>
</table>

Included in program fee. Double-occupancy, 4 nights

<table>
<thead>
<tr>
<th>Student - Entrance Fees, Excursions, and Cultural Activities</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Cultural heritage center</td>
<td>$0</td>
</tr>
<tr>
<td>$0</td>
<td></td>
</tr>
<tr>
<td>Included in program fee</td>
<td></td>
</tr>
<tr>
<td>Zoology excursion</td>
<td>$0</td>
</tr>
<tr>
<td>$0</td>
<td></td>
</tr>
<tr>
<td>Included</td>
<td></td>
</tr>
<tr>
<td>Business networking with three international companies</td>
<td>$0</td>
</tr>
<tr>
<td>$0</td>
<td></td>
</tr>
<tr>
<td>Included</td>
<td></td>
</tr>
</tbody>
</table>

✔️ See the related section *Additional Items to be Included in Total* below
Additional guidance for this section

- Always include notes. Ex: “Using Expedia for flight” or “Two nights lodging at the Radisson Hotel in London before going to the hostel”
- Itemize all sections thoroughly. Add more lines if needed.
- Itemized sections generally match the itemized faculty sections. Ex: Everyone will likely have the same excursions or in-country transportation costs.

The Lodging and Meals section should only include meal costs that the Faculty Leader will collect.

- This includes group meals or specific meal activities that need one payment or payment in advance.
- Do not include meal costs that students will pay for on their own, out-of-pocket. Itemized those in the student Student Overall Cost section instead.
- Faculty may not collect money for individual meals then give those funds back to students before going or while abroad.

The Entrance Fees, Excursions, and Cultural Activities section should include an itemized list of these activities and their individual costs.

- Faculty should only collect money for activities that must be paid in advance or for group activities that require one payment (that the faculty leader will pay for).
- If there is a lump-sum faculty program cost that includes most student expenses, include this amount under the Additional items to be included in total student section

The Emergency Costs section is to accommodate any emergency – or non-emergency, unexpected situation – that may arise.

- We highly encourage faculty not using a program provider to include an amount in this section.
- Typically, anywhere from $50 - $200 per student is appropriate depending on location
- Emergency costs may be used for many items, including: unexpected costs while traveling, emergency or medical costs that insurance will not cover, last-minute single rooms due to an imbalance of male/female students, changes in exchange rates, lost luggage, etc...

The Additional Items to be Included in the Total section should be used for any additional student cost items that do not fit elsewhere on the spreadsheet. Please itemize these items and include detailed descriptions.

Additional Items are costs students may incur, collected by the faculty leader. An example of this is the lump-sum student program cost. See below.
Lump-sum student program cost

- Students who have a lump-sum student program cost that includes most student expenses will include this amount in the Additional items to be included in total section and add detailed notes.
  - In other sections, for these items that are included (lodging, excursions, etc..) the amount would be $0.00
  - It does not have to be fully itemized, but it should explain the basics of what is included.
- See spreadsheet example below.

<table>
<thead>
<tr>
<th>Student - Additional items to be included in total</th>
</tr>
</thead>
<tbody>
<tr>
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<tr>
<td>Includes student accommodations in both cities at double-occupancy, 2 meals per day, fancy snacks, entrance fees &amp; activities listed on itinerary, tour guide, transportation to/from airport in London and Dakar, provider-branded backpack.</td>
</tr>
</tbody>
</table>

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.

The most important thing to remember about this section: Faculty leaders will not collect these amounts.

Spreadsheet Guidance: Student Overall Cost section

The Undergraduate or Graduate Tuition and Fees section is for the tuition and fees charged by MTSU for the program course.

- MTSU Signature Program tuition is discounted by 25% for summer programs only.
- If the summer tuition and fees amount have not been released by MTSU for the program term, use the current year tuition and fees, minus 25%.
- If the program has no graduate students, leave this section blank
- If you have questions about this amount please contact the OEA for guidance.

The Education Abroad Fee and iNext Insurance Fee section shows a set amount determined by the OEA each year.

- Faculty should not change this amount on the spreadsheet or collect these funds.
- If the spreadsheet is missing this amount, please enter $83 ($50 Education Abroad Fee, $33 iNext fee)

The Miscellaneous Expenses section should include expenses students can or may expect to have that cannot be categorized in any other section of the spreadsheet.

- This includes personal expenses (cell phone costs, free-time activities, souvenirs, etc...) and optional program activities.
• Miscellaneous expenses will be considered in the calculation of the Student Overall Program Cost.

The **New Passport section** should be pre-filled on the spreadsheet. If it is not, please enter $145, the cost of a new passport.

The **R/T Airfare Estimate section** should be the estimated cost of a flight per student. If the flight is included in the program fee (such as with EF College Study Tours programs), enter $0.00 and make a note.

**Undergraduate/Graduate Student Overall Cost (SOC)**

These amounts show the undergraduate and graduate student overall cost, per student.

This amount includes:

• Faculty Expenses (FE) per student
• Student Program Fee (SPF) (those funds collected by the faculty leader)
• Any items listed under Student Overall Cost (SOC) such as tuition, Education Abroad Fee, miscellaneous expenses, passport, airfare estimate

By default, the spreadsheet will automatically calculate both undergraduate and graduate costs, even if the program has zero graduate students listed at the top of the budget spreadsheet.

**Student Overall Cost Estimate (Cost Sheet)**

The Office of Education Abroad will create a Student Overall Cost Estimate, also known as the cost sheet, using the budget spreadsheet provided with the program proposal. It will be available to students on the program page on the OEA website and in the OEA office. Faculty may share the cost sheet with students. The Office of Financial Aid may use the estimate to determine the student cost of attendance for the program when determining aid.

If the cost of the program changes, an updated cost estimate can be created.
II. DETERMINING AND CONFIRMING THE BUDGET

Particular attention must be given to the program cost, especially the Student Program Fee (SPF). Faculty determine the program budget when building the program. The budget spreadsheet is submitted with the program proposal and support the information listed on the Travel Authorization. Faculty leaders teaching on a consortium program follow the budget determined by the consortium.

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. Faculty who choose not to work with an OEA affiliate to develop the program will be fully responsible for understanding all aspects of the program and outside vendor policies.

Attention to vendor payment deadlines and cancellation/refund policies is also important and can affect recruiting students, program viability (payments due too early in the process may mean shorter recruiting time), or refunds if the program does not make.

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

1. Faculty leaders can with the VPIA and the OEA Director to discuss and confirm the education abroad program budget, if desired.

Budgets should be determined as much as possible prior to the program proposal submission. The VPIA and OEA Director can provide guidance with budget options and show how the program budget relates to the Travel Authorization, program construction, student decisions and commitment to a program, etc...

2. Each student on the program should pay the same program fee.

In the case of a student withdrawing from the program early, it is not advisable to transfer non-refundable deposits from one student to another student. To be fair, all students should have the same program costs and, in the case of remaining funds once the program is completed, should receive an equal refund.

If the program cost decreases, as is sometimes the case, faculty leaders can reduce the cost for all participants. Program costs may go down when there is an increase in student participants (more than originally planned for) or if program elements change (such as a change in program activities, or a different cost than originally estimated for a program element).

Adjustments can be made before the program begins. Faculty leaders can adjust the final student program payment made into the EAR fund. Or, students can pay the program payments as planned and adjustments can be made when the program ends via student refunds. As long as program costs are equal for each student, either method is acceptable.
3. Creating the program budget

- OEA recommends a budget created based on 8-10 participants for new Faculty Leaders.

- If the budget is based on 10+ students and fewer are recruited, faculty may have to increase the program fee, which is obviously a situation to avoid.

- If the Student Program Fee is based on 8 students and more are recruited then the program costs may go down. The faculty leader needs to understand vendor price points, where the costs may go up or down depending on the number of students recruited for the program.

- The faculty leader must also understand if the program provider has a maximum number of students that can be accommodated on the program.

- There have been several times when a first-time program cancelled because the faculty leader budgeted for too many students but recruited fewer. When the cost per student increased, students could not pay the additional cost and withdrew.

- Many program providers provide a price-point for programs based on the participant (student) estimate you provide and can reduce costs as additional students are added. Please check with your program provider to determine if this is possible for your program.

Faculty should calculate the Student Program Fee with variable factors in mind. Faculty Expenses (FE) and administrative fees, including emergency fees per student and faculty cell phone costs should be included, as should a buffer for accommodations.

For example, faculty who plan a budget for 8 students and only budget four hotel rooms (shared) may have to raise the Student Program Fee if there is an imbalance of male/female participants on the program. It is better to plan for an extra single room from the beginning to accommodate any last-minute single rooms needed.

In almost every case, Faculty Leaders should be budgeted in single rooms only. Faculty Leaders may not share rooms with a student. See the Faculty Handbook Policies section about housing arrangements.
4. Reduce costs by exploring creative options

Program budgets should be created with good planning and creativity from the beginning. However, changes in program fee can occur after the program has approval. It is recommended only when circumstances are out of the faculty leader’s control, such as an unexpected rise in cost for one program element (like group transportation), or if a program element is no longer available (such as a planned tour or activity).

The following tips may assist with budget planning or budget changes.

- Faculty leaders may be able to reduce housing costs by limiting hotels and staying at quality hostels or in a residence hall of an MTSU Exchange university partner.

- If using a custom program provider, faculty can ask the provider to change program options from the quote provided. Faculty leaders do not have to use all options presented by the provider and some adjustment to the initial program/quote is expected. Removing an excursion, expensive guest speaker, changing housing, limiting locations to one or two cities, etc... can make help lower the program cost.

- In some countries or regions, a student discount card like ISIC may offer students discounts on museums, in-country travel, and more. Faculty may want to consider these options to find lower-cost activities and excursions for the program.

- Faculty can consider using public transportation instead of renting a charter bus and driver. This can reduce program costs significantly and give MTSU students experience with public transportation.

- Faculty leaders may be able to collaborate with MTSU Exchange partners to find low-cost academic/lecture space or to use their campus services, such as the library or classroom space. Please contact the Director of the OEA or the VPIA for a list of exchange partners and contacts.

- Faculty leaders may collaborate with other universities – not necessarily MTSU-affiliated exchange universities – to use their residence halls or other spaces. The university would function as the vendor in most cases, requiring a contact or invoice for payment as with any other vendor.

- Reducing the number of group meals and asking students to bring funds for their own meal costs can save on program costs. Often, students have highly variable spending habits and

The OEA has institutional memory regarding the best price points for MTSU students considering location and the duration of a program.
III. MTSU BUSINESS OFFICE PAYMENTS AND PROCEDURES

Payment procedures and information about business payments for study abroad programs are below. For additional information, please contact Ben Jones, Director of Accounting Services, in the MTSU Office of Business and Finance at ben.jones@mtsu.edu.

Education Abroad Program payments should be direct to the vendor as much as possible. We cannot stress this enough.

Like student payments, EAR funds and vendor payments flow through the faculty leader’s department as a function of the department, not through the Office of Education Abroad. Faculty leaders will likely use the assistance of a department Coordinator or Executive Aide (whomever handles budget items and payments).

Additional information on group travel and budget & finance policies are on the MTSU website, linked at the end of this section.

What are direct payments?

- Payments made directly to a vendor, typically for larger purchases such as group accommodations, a university fee (for use of facilities, etc...), payments to a custom program provider for the program, and similar payments.
- Payments planned out in advance for program costs
- These are not small payments like taxi fees, individual meals, etc...

Contracts

In some cases, the vendor will require a contract. If the vendor requires a contract it must go through the MTSU Contract Office before a payment can be processed.

- Contracts must go through the faculty leader’s department.
- Faculty may not agree upon or enter into contracts on behalf of the university.

Reservation with deposit

In other cases, the vendor will require a reservation with deposit.

- Faculty leaders should not commit and pay a reservation in full unless they are sure the program will run and have funds in the EAR fund to do so.
- Full payments will be made about a month in advance.

Before making any vendor payment, faculty leaders must understand the vendor cancellation and refund policy to mitigate risk of losing student funds if the program must cancel.

What is required for a vendor payment?

- W-8 form for non-U.S. vendors, W-9 form for U.S. vendors
- Invoice from the vendor sent directly to the Business Office – send to invoice@mtsu.edu
- The Travel Authorization and Travel Memo must be approved
- The program EAR fund must be open
- There must be enough money in the EAR fund to pay the invoice
- If a contract is required, it must be complete. For recurring programs, the contract must be current.
• Include the full amount and payment amounts/deadlines for payments in the purchase order via MT$ource.

Wire transfers – the Business Office must have the bank information in addition to the W-8 or W-9 plus the invoice and all of the above.

W-8 or W-9 questions can be directed to Ben Jones, ben.jones@mtsu.edu

MT$ource may be used to make payments to a vendor.
• The Travel Authorization and Travel Memo must be approved
• The program EAR fund must be open
• There must be enough money in the EAR fund to pay the invoice
• If a contract is required, it must be complete. For recurring programs, the contract must be current.
• Include the full amount and payment amounts/deadlines for payments in the purchase order via MT$ource.

Faculty leaders may request assistance with payments from the department Executive Aide or Coordinator who can assist with this process.

✓ See policy 663 VII. Acquiring Goods and Services Abroad for more information, linked at the end of this document.

Wire Fees
The faculty leader must ask if there will be a wire fee for each vendor. If so, the amount must be included on the budget spreadsheet and the Travel Authorization in some way.

The Business Office does not know the wire fee for each vendor or country. This is variable. If the vendor knows the wire fee amount, faculty should ask the vendor to include this on the invoice.

If the wire fee is not included on the invoice(s) and the faculty leader is asked to pay the wire fee once abroad, please pay and submit for reimbursement on your travel claim. Get a receipt!

Receipts
The faculty leader must get a receipt for each purchase made with cash advance monies or for items paid out-of-pocket. These items should be planned for in advance, included on the budget spreadsheet and Travel Authorization, and reconciled on the travel claim.

Receipts are required for reimbursement.

Cash Advances
Cash advances are permissible when cash is necessary and when a direct vendor payment or credit card payment cannot be made.

When requesting a cash advance:
• Money must be in the EAR fund to cover the request.
- The Faculty Leader must include the estimated expenses (detailed) that require cash payment, along with a written explanation of why a credit card or direct payment to the vendor is not possible.
- The explanation is mandatory.

The cash advance must be approved on the Travel Authorization (TA). If the cash advance is not approved on the original TA, an updated TA must be submitted.

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.

**Paying for program expenses with a faculty personal credit card**

- Faculty leaders may not use a personal credit card if direct payment to a vendor is an option.
- Faculty leaders should plan ahead when constructing the program and methods of payment to avoid this scenario as much as possible.
- If a large payment cannot be made via direct vendor payment, faculty should consult with the VPIA, OEA, and Business Office to determine if there is another solution first.
- Is allowed, but must be accounted for on the Travel Authorization as “reimbursable expenses” and details should be included in an attachment to the TA for auditing purposes.
Travel Authorization & Travel Memo

The Travel Authorization (TA) and the Travel Memo are required documents and reflect program budget amounts. Faculty leaders submit them at the beginning of the program process, ideally with the program proposal.

- The TA is based on the group costs, not the individual faculty costs, for the program.
- The Travel Memo is signed by the Department Chair, Dean, University Provost, and University President.
- The TA is signed by the Department Chair, Dean, and the Vice Provost for International Affairs.
- The Travel Authorization and Travel Memo are submitted together.

OEA recommends submitting the TA and Travel Memo with the program proposal, if possible. This helps expedite the EAR index process so students can begin making program payments. With TA approval, the Business Office will open an EAR index for the program so students can make program deposits and payments.

Upon completion of the program, faculty leaders will submit a Travel Claim (TC) to reconcile all program costs and reference the TA in this process.

Each program will have one Travel Authorization and one Travel Memo. This is true even if faculty combine logistics and programs travel together. Faculty are responsible for their own program payments and travel documentation. Following the program, each program will have a related Travel Claim. Collaborative programs – those with the same logistics and vendors but different courses and faculty leaders – will each have a TA, Travel Memo, and TC. Faculty in collaborative programs may want to consult with the VIPA, the OEA Director, and the Business Office for assistance.

All signatures must be obtained before sending the travel memo and TA to the Business Office for processing.

☑ Instructions on how to create the Travel Memo are on the Office of Education Abroad website in the Faculty section.

Faculty leaders will receive an email from Accounting Services after the TA is approved. The email contains instructions on how to submit a Travel Claim (TC) upon return as well as information about the Travel Roster.
Travel Claim

Faculty leaders usually have 30 days to complete a travel claim, a reconciliation of all program travel expenses. Refer to the original email from MTSU Accounting Services (referenced above) for additional guidance.

Faculty that create programs that run in June must be aware of the shortened travel claim deadline.

Programs that operate in June must be reconciled and the Travel Claim submitted no later than July 9. This overrides the 30-day claim policy.

- Example: If the program ends on June 21, faculty leaders have until July 9 to submit the travel claim (not July 21).
- Faculty leaders may want to consider creating a study abroad program with this in mind.

Faculty leaders should submit all receipts with the travel claim.

✓ Please see the Upon Return section in this document for more information about the travel claim.

Travel Roster and Certification

This form is submitted with the Travel Claim (TC) at the end of the program.

- Each participant must sign the document during or after the Education Abroad program travel.
- The document should not be signed before the trip.
- Faculty leaders will indicate the amount of money received as “$0”. Faculty should not provide any monies directly to students.
IV. STUDENT PROGRAM PAYMENTS AND REFUNDS

Program Payments

Very few program providers have an online payment portal where students will make program payments directly to the company. It is likely that you will collect some funds from students for your program, either to make payments directly to vendors individually (such as to a tour company, travel agency, in-country transportation company, for accommodations, etc...), or to make a larger payment to one provider for a custom program.

Students have two options to make payments to the program:

1. Pay at the MTSU Cashier’s window (SSAC) Building into the program EAR fund
   a. Students must take a payment form with your program information and EAR fund/index number on the form or they will not be able to make a deposit.
   b. A sample payment form can be found on the OEA website in the Faculty section

2. Pay online with a debit or credit card
   a. Students must have your EAR fund/index numbers readily available to enter on the online payment form.
   b. Online payment instructions can be added to the form or students and/or faculty can ask OEA staff for that information.

Faculty are responsible for keeping track of student payments. It is highly recommended that faculty keep up with payments on a regular basis to ensure that no accounting/deposit mistakes are made. If mistakes are found they can be addressed in a timely manner. Catching a mistake made one week later is much easier than trying to address it five months later. It is also a way to ensure that all participants are on-track with program payments.

- Encourage students to keep all receipts made from program payments.
- Encourage students to share a copy of the receipts with you.
- Online payments will have date & time included on the receipt.
Student Refunds

There are circumstances when a student refund is required. Examples include student overpayment, student withdrawal from the program, or if the program cancels. Staff in the faculty leader’s department who work with budget (such as Coordinator or Executive Aide) may be able to assist. Student refunds require accurate recordkeeping of program payments. Program refunds are the responsibility of the faculty leader.

Refunds are initiated a couple of ways depending on how the payment was made and when the payment was made.

1. Individual student refund before the program begins

When a student requires a refund before the program begins, the faculty leader must initiate that refund since the EAR fund is under the faculty's name. The faculty leader will:

- Determine the refund amount and initiate a payment authorization for that amount
- Confirm the student’s mailing address before starting the payment process
- Initiate the payment authorization for the refund amount

Additionally, the VPIA must sign the payment authorization.

Note: There are circumstances when a student cannot receive a refund until the program has ended and the program budget has been reconciled. Faculty should ask the Business Office for additional guidance.

What do to with non-refundable deposits – individual refunds

If a student withdraws from the program, they typically forfeit any non-refundable deposit made to the program. The faculty leader can refund the remainder of the program payments in this scenario.

- This is only applicable when the faculty leader made it very clear from the beginning that the program deposit was non-refundable.
- Transparency is key and expected by the OIA, OEA, and MTSU.

Alternately, the faculty leader may opt to return the non-refundable deposit if they wish. This is only appropriate in circumstances where no vendor payments were made on behalf of the student. Faculty leaders are encouraged to consult with the OEA Director or VPIA in this scenario.
2. **Group refunds if the program is cancelled**

When all students require a refund because the program is cancelled, the faculty leader must initiate those refunds since the EAR fund is under the faculty leader's name.

The MTSU Signature Program Cancellation Policy (Faculty Handbook) states:

- If the University cancels a program prior to departure or while the program is in progress for reasons beyond its control...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

The faculty leader will:

- Determine the refund amount for each student
- Confirm the student’s mailing address before starting the payment process
- Contact the Business Office for guidance for the group refund.

The Business Office may ask for a batch refund list from the faculty leader prior to the payment authorizations to determine if a credit/debit card refund is possible for students who paid by card. Card refunds are the preferred method of refund, if possible.

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**Group refund process**

If the student paid at the MTSU Cashier's Window by card (debit/credit), the Business Office will first try to refund to that card.

- That is not always possible
- That is sometimes only partially possible
- The refund might come as one payment or in multiple, partial payments

If there was no card payment or they cannot refund by card (whole amount or in part), MTSU accounting services will contact the faculty leader with information about payment authorization needed to refund the remaining balance owed to each student.

The faculty leader is responsible for completing the payment authorization if needed.

Once MTSU accounting services receives the payment authorization form they will contact each student via email to request they set up a new direct deposit account (ACH). This is separate from the student's existing direct deposit via Pipeline – the one that goes through the student account – because it is a separate accounting system.

- If the student sets up the new direct deposit, they will receive a refund via direct deposit.
- If the student does not, the student will receive a check in the mail.
Additionally,

- The VPIA must sign each payment authorization.
- **If a vendor was not paid** and all funds remain in the EAR fund, the faculty leader will refund everything back to the students.
- **If a vendor was paid**, the faculty leader is responsible for trying to obtain refunds, to the extent possible. Refunds are made with the remaining funds in the EAR fund based on the amount each student deposited, minus their (equal) portion of the vendor payment that cannot be recovered.
- If the program received funds from the OIA, the faculty leader must return those funds to the OIA. **OIA funds gifted to a program may not be refunded to students.**

Group refunds are one reason the OIA and OEA require faculty leaders to be fully aware of vendor cancellation and refund policies before agreeing to the transaction or planning to use that vendor for the program.

The Office of Education Abroad will make every effort to assist with group refunds, when possible, but ultimately the process will be the responsibility of the faculty leader.

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**What do to with non-refundable deposits – group refunds due to program cancellation**

Faculty who cancel programs must provide a full refund to each student, when possible, including the non-refundable deposit amount. Programs cancelled by MTSU are the same.
V. OFFICE OF INTERNATIONAL AFFAIRS (OIA) PROGRAM SUPPORT:

Faculty may request funding from the OIA for the program abroad. There is no guarantee that funding will be available.

Deadline: All OIA funds must be requested by September 1 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).

- 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.
- If a program is cancelled and received funds from the OIA, the faculty leader must return those funds to the OIA. OIA funds gifted to a program may not be refunded to students. Students should not receive a refund in excess of what they paid into the program.
- If there are excess funds at the end of a program and the program received funds from the OIA, the faculty leader must return those funds to the OIA first and refund students from the remaining amount.

A link to the OIA travel support form is included at the end of this document.
VI. **AFTER BUDGET IS DETERMINED AND CONFIRMED**

The Office of Education Abroad recommends the following once the program budget has been determined and the program proposal is moving forward and/or approved.

1. **Establish deposit and payment rules**

It is important to provide clear information to students about the deposit amounts, what occurs if a payment is past the deadline, and which payments (if any) are non-refundable.

Faculty leaders should also explain why funds are needed for a particular deadline. Ex: It is helpful for students to understand that the deposit and first payment are to secure accommodations and the program guide, or because the first vendor payment is due by ‘x’ date.

2. **Establish deposit and payment deadlines**

The establishment of firm and early deadlines is the best strategy for success. In setting these deadlines, please note the following recommendations.

The faculty leader should create a deposit form with the program index number (EAR fund), deposit and payment amounts and payment deadlines for students. A sample payment form is in the Faculty section of the OEA website.

- If all payment deadlines are on the form, students can use the form over and over to make payments and will not have to contact the faculty leader each time a payment deadline is near.
- OEA recommends non-refundable deposits should be no less than $500.
- Faculty Leaders often establish one deposit deadline and two payment deadlines. For spring break and summer programs, it is highly recommended that the deposit should be in the fall term.

Faculty Leaders should keep in mind the payment deadlines established by the third-party providers and/or travel agency when creating the program payment deadlines.

3. **Create a group TA for the program**

OEA recommends the faculty leader create the TA and Travel Memo for submission with the program proposal. If this not been done, OEA recommends submitting these items very early in the process, right after program approval.

If you need assistance creating a TA, please contact your department Coordinator or Executive Aide, the MTSU Business Office, or the OEA Director.
4. **Establish an EAR fund account**

An EAR index account (also called EAR fund) must be established for student deposits and vendor payments. There is no way to accept program payments without an EAR fund and faculty **should not** accept program payments in any other manner.

- The Travel Authorization and program proposal must be approved before establishing an EAR fund.
- Recurring faculty may be able to re-open the EAR fund from previous year programs once the program is approved.

Faculty leaders will receive an email from Accounting Services after the TA is approved. The email contains instructions on how to submit a Travel Claim (TC) upon return as well as information about the Travel Roster.

Faculty are fully responsible for the EAR fund, including monitoring student deposits, making vendor payments with EAR funds, student refunds, and reconciling the EAR fund once the program ends.

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*Faculty should consider the EAR fund similar to an approved study abroad program bank account where they must monitor the flow of funds in and out for program operations. Faculty leaders must follow all MTSU policies (OEA, OIA, and MTSU) for the EAR fund and related operations.*

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The Business Office usually automatically generates/opens EAR funds with TA approval. The faculty leader will receive an email when this occurs. If not, faculty can contact Ben Jones at ben.jones@mtsu.edu to request an EAR fund account for the program.

**Collaborative Programs**

It is highly recommended that collaborative programs led by two or more faculty members sharing logistics but teaching different courses have individual EAR funds. When each program has an EAR fund, the respective Faculty Leaders can easily monitor deposits and payments for students participating on that particular program.

**EAR Fund Deposits**

Students will deposit their Student Program Fees directly into the established EAR fund accounts at the Student Services Admin Building (MT One Stop) or online and Faculty Leaders will use this account to pay vendor costs.

See the information in *IV. Student Program Payments and Refunds* in this document and earlier in this section for more details.
**EAR Fund - Reconcile After Program**

Faculty Leaders will reconcile the EAR fund via the Travel Claim and student refunds, if required. See the information in *IV. Student Program Payments and Refunds* and *VII. Upon Return* sections for additional information.

**Other EAR fund information**

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.

Please share the EAR fund account (index) number and student program payment form with OEA staff once established.

Faculty Leaders using a program provider where students pay all program fees online directly to the provider only need to establish an EAR fund if they expect students to cover the faculty costs not included in the program. This is a program model seen with faculty using EF College Study Tours as the custom program provider. Students would pay the program fee online at the EF program website and a small program fee into the EAR fund. In these cases, an EAR fund is not required if the faculty leader is willing to give up any uncovered program costs.

*If the faculty leader does not establish an EAR fund for these costs, they may not be claimed once the program ends.* This includes standard per diem.

Please contact the Director of the OEA for more information.

### 5. Track deposits and payments

Faculty leaders are responsible for tracking deposits and payments into the program EAR fund. This can be tracked using Banner Finance or by keeping track of collected student payment forms/receipts.

- OEA highly recommends checking the account balance in Banner Finance on a regular basis to ensure correct deposits and payments show up in the account.
- The Faculty Leader is responsible for following through with incorrect program payments in a timely manner.
- Ask for assistance from departmental Coordinator(s) or the Executive Aide, or the staff member responsible for budget payments for the department.
- OEA staff can assist checking the EAR fund balance if the department Coordinator or Executive Aide is not available, but Faculty Leaders should largely rely on the expertise and assistance of their department staff.
VII. FINANCES WHILE ABROAD

Receipts and finances while abroad

Faculty leaders are required to keep receipts for meals or expenses to be reimbursed at the end of the program. Meal reimbursement can be either by daily per diem or by receipt. These amounts will be determined before the program is approved in the program budget and included on the budget spreadsheet under the faculty costs section.

- Receipts for all reimbursable expenses should be original and have as much detail as possible.
- Receipts must be in English or must be translated before submitting with the travel claim.

The OEA recommends Faculty Leaders take a photo of each receipt when obtained while abroad. Keeping a photo record as well as the original receipt serves as a backup in case an original receipt is lost.

Faculty may want to keep track of the daily conversion rate while abroad (screenshots are helpful). This can help when reconciling receipts for the travel claim.

Some faculty keep a daily travel expense log to keep the expenses organized for ease of reconciliation of receipts for the travel claim.
VIII. **UPON RETURN**

Faculty Leaders are responsible for reconciling the EAR fund, cash advance (if applicable) and submitting a Travel Claim **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.

**Note: Programs that operate in June must be reconciled and the Travel Claim submitted no later than July 9. This overrides the 30-day claim policy.**

- Example: If the program ends on June 21, the Travel Claim deadline is July 9, not July 21.
- See the Faculty Handbook, V. Developing the Program section for additional guidance.

The Travel Roster (referred to earlier in this document) must be submitted with the Travel Claim.

**Unused Program Funds**

Unused program funds must be refunded equally to students once the program has concluded and the travel claim has been completed. Faculty should take care to ensure that all vendor payments have been made before initiating student refunds.

It is preferable that no funds remain in the EAR fund. However, amounts of $50 or less may remain in the EAR fund once the program travel claim has been processed and all outstanding expenses have been paid. Anything higher than this amount should be refunded to all students on the program in equal amounts.

**Faculty leaders may not retain leftover funds for use in a future program year.**

Refunds should be:

- Initiated by the Faculty Leader
- Processed on Payment Authorization forms, and
- Submitted to the Business Office in a timely manner

If the program received funding from OIA, the surplus will go to cover this funding **first.**
Budget and Finance Links

- Link: [Office of Education Abroad - Faculty](#)
- Link: Vendor contracts: [MTSU Contract Office](#)
- Link: [MTSU Policy 663, Education Abroad Financial Procedures](#)
- Link: [MTSU Travel Policies](#)
- Link: [Office of Business and Finance forms](#)
  - Travel Authorization (interactive group)
  - Travel Claim
  - Travel Roster
- Link: To request OIA travel funds: [Faculty Travel Funding Request Form (group)](#)
- Link: [MTSU Tuition & Fees](#)

- Email: Ben Jones: ben.jones@mtsu.edu
- Email: Melissa Miller, Director, OEA: melissa.miller@mtsu.edu
- Email: Maureen Young, Executive Aide, OIA: maureen.young@mtsu.edu
- Email: Office of Education Abroad: educationabroad@mtsu.edu
- Email: Sent vendor invoices to: invoice@mtsu.edu