

Faculty Director Timeline

Summer & Spring Break Programs

Tools and timeline for leading an MTSU Signature Education

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Summer 2022. Timeline for Summer MTSU Signature Study Abroad Programs

Month(s)	Action
Summer 2020 – Spring 2021	Faculty meets with VPIA and Director of Education Abroad to discuss possibilities
Summer 2020 – Late Summer 2021	Faculty develops the program
September 1, 2021	Summer program proposal deadline
October 2020	Faculty Financial Meeting to discuss study abroad budget and finance questions – optional
October 2020	New faculty leader program briefing with the VPIA and OEA to discuss all aspects of the program process
Date of program approval – Mid-Fall 2021	Faculty works with OEA for program marketing
Date of program approval – early October 2021	Faculty submits group Travel Authorization (TA) and opens EAR fund account
Date of program approval – February 2021	Faculty recruits, collections applications and deposits, and accepts participants
October 2021	Faculty Financial Meeting to discuss study abroad budget and finance questions
October 2021	New faculty leader program briefing with the VPIA and OEA to discuss all aspects of the program process (if not already attended)
November 2021	Study Abroad Fair
December 2021	Office of Education Abroad Commitment Scholarship Deadline
February 2022	Office of Education Abroad Scholarship deadline
February 2022	Faculty Financial Meeting to discuss program budget and finance questions - optional
Mid-February – early March 2022	Faculty decides if program will run based on committed participants (deposits & payments)
Late February – early March 2022	Vendor payments begin
March or April 2022	Mandatory MTSU pre-departure orientation
April 2022	Emergency guidelines and procedures meeting with VPIA. All faculty leaders attend
May – August 2022	Faculty leads MTSU Signature Program

Spring Break 2022. Timeline for Spring Break MTSU Signature Education Abroad Programs

Month(s)	Action
Summer 2020 – Spring 2021	Faculty meets with Vice Provost for International Affairs and Director of Education Abroad to discuss possibilities
Summer 2020 – Late Summer 2021	Faculty develops the program
October 2020	New faculty leader program briefing with the VPIA and OEA to discuss all aspects of the program process
October 2020	Faculty Financial Meeting to discuss study abroad budget and finance questions – optional Spring Break program proposal deadline
September 1, 2021	<i>*Ideally, this is submitted in spring 2020 to get a head start on recruiting</i>
Date of Program Approval – September 2021	Faculty submits group Travel Authorization (TA) and opens EAR fund account
Date of Program Approval – early October 2021	Faculty works with OEA for program marketing
Date of Program Approval – February 2021	Faculty recruits, collections applications and deposits, and accepts participants
October 2021	Faculty work with department for course information: Pipeline and student registration
October 2021	Faculty Financial Meeting to discuss study abroad budget and finance questions
October 2021	New faculty leader program briefing with the VPIA and OEA to discuss all aspects of the program process (if not already attended)
November 2021	Study Abroad Fair
December 2021	Office of Education Abroad Commitment Scholarship Deadline
December 2021	Vendor payments begin <i>*variable, depends on vendors</i>
Late December 2021	Office of Education Abroad Scholarship deadline, spring break programs
January 2022	Faculty decides if program will run based on committed participants (deposits & payments)
February 2022	Faculty Financial Meeting to discuss program budget and finance questions
February 2022	Mandatory MTSU Pre-Departure Orientation
March 2021	Faculty leads MTSU Signature Program

The following detailed timeline is an example for programs running in summer 2022.

The process is similar for spring break programs, except some timeline items are pushed up to earlier in the year. See the spring break timeline overview earlier in this document for additional details.

- ✓ Resources can be found on the OEA website: www.mtsu.edu/abroad

SUMMER 2020 – SEPTEMBER 2021- PLANNING

Program development typically occurs 16-24 months prior to the program start date.

During this time, faculty should:

- Determine location and location specifics (excursions, activities, classroom space if needed, etc...)
- Consult with the department to ask about feasibility and for support
- Consult with the department about the course: Is it a new course that needs curriculum review or is this an existing course?
 - Related: Faculty may want to consider if the course can be (or is) cross-listed, what type of major and minor it appeals to, and how the study abroad course can fit into the degree plan of students.
- Discuss the program with the VPIA and OEA Director to determine feasibility and to ensure it does not overlap with other MTSU Signature Programs for the same term
 - Similarly, faculty can review study abroad programs on the Office of Education Abroad website to gauge feasibility or need
- Request departmental or Office of International Affairs funding for a preliminary visit to the location for planning
- Visit the location for detailed planning or to solidify connections with colleagues or partners, if applicable
- Request quotes and itineraries from custom program providers
- Meet with other MTSU Faculty Leaders to learn from their experiences
- Learn how to pay vendors and the financial policies/processes for study abroad programs with the Business Office and the Education Abroad Director
- Review the Office of Education Abroad website to understand the student study abroad process
- Add to calendar: October New Faculty Leader Program Briefing with the Vice Provost of International Affairs and the Office of Education Abroad

There is certainly more to add to this planning and development section but this overview should give faculty an idea of the time it typically takes to develop a program. Faculty should use the VPIA, OEA Director, and other MTSU Faculty Leaders as resources to learn and develop the program. Faculty who design a program 100% on their own without using a third-party provider for logistics assistance will need longer planning time.

Please keep in mind that creating the budget can take a couple of weeks (if not more). OEA recommends keeping a running list of costs, vendor payment details (ex: if a contract is needed, the deposit and payment dates, the minimum and maximum number of students) and other budget items as the faculty member develops the program. These can be added to the budget spreadsheet once compiled with help from the OEA Director, if needed.

SEPTEMBER 2021

The program proposal deadline is September 1 for summer programs of the following year. The deadline is the same for new and recurring programs. Faculty are encouraged to submit the proposal earlier, if possible, to get started on recruiting as soon as the fall term begins.

Action - September	Notes
<input type="checkbox"/> Submit program proposal	<i>Deadline September 1</i>
<input type="checkbox"/> Submit the Travel Authorization and Travel Memo	<i>The EAR fund can be opened once these are approved</i>
<input type="checkbox"/> Create a program application	<i>Templates are available on the OEA website in the Faculty section</i>
<input type="checkbox"/> Determine student payment amounts and deadlines	<i>Coordinate these with vendor payments; break into manageable amounts</i>
Share with OEA: <ul style="list-style-type: none"> <input type="checkbox"/> • Program application <input type="checkbox"/> • Student payment form with EAR fund index number and payment deadlines 	<i>Email please</i>
<input type="checkbox"/> Work with the OEA to design marketing materials	<i>OEA Advisor</i>
<input type="checkbox"/> Schedule classroom presentations or plan fall term information sessions	<i>The OEA can present with you to share scholarship or process information. We recommend 15-20 classroom visits in the fall term (really!). Ask OEA and Global Ambassadors for assistance with this.</i>
<input type="checkbox"/> Begin recruitment using marketing materials and by discussing the program in the faculty classroom	
<input type="checkbox"/> Add to calendar: Study Abroad Fair, November	<i>Faculty will receive an email about the Fair with program approval or in early September</i>
<input type="checkbox"/> Add to calendar: Faculty Leader Financial Meeting, October	<i>Faculty will receive an email about the meeting with program approval or in early September</i>
<input type="checkbox"/> Add to calendar: New Faculty Leader Program Briefing, October	<i>Required for new faculty who have not attended this meeting. Options for those who already attended or for recurring Faculty Leaders.</i>

Items you need this month to complete tasks

- ✓ Program application templates
- ✓ Student payment form examples
- ✓ OEA Advisor contact info to start the marketing discussion, followed by your marketing materials (that the OEA Advisor will order for you)
- ✓ A quick pitch to share your program with students – 5 minutes to get them interested – the basics. If you can't sell your idea in 5 minutes it will be harder to engage students and get commitments
- ✓ A very basic idea of the student study abroad process, including preapproval and available scholarships to share with students
- ✓ See the *Tips for Recruiting* document on the Office of Education Abroad website (Faculty Section) for more information.

OCTOBER – NOVEMBER 2021

October is the heaviest recruiting month and it leads up to the annual Study Abroad Fair in November. It is also a chance to get marketing materials up around campus, to present in classrooms, and hold information sessions.

Action – October & November	Notes
<input type="checkbox"/> Submit the Travel Authorization and Travel Memo	<i>The EAR fund can be opened once these are approved</i>
<input type="checkbox"/> Continue working with OEA on marketing materials	<i>Aim for having marketing materials by early October</i>
<input type="checkbox"/> RECRUIT! Email students, classroom presentations, info sessions	<i>Ongoing</i>
<input type="checkbox"/> Collect applications (with deposits) from committed students, send email confirmation to students	<i>Ongoing</i>
<input type="checkbox"/> Faculty Leader Financial Meeting, October	<i>Highly recommended. Bring your budget, financial, & vendor payment questions!</i>
<input type="checkbox"/> New Faculty Leader Program Briefing, October	Required for new faculty who have not attended this meeting. <i>Optional for faculty who already attended or for recurring Faculty Leaders.</i>
<input type="checkbox"/> Study Abroad Fair, November	<i>Faculty will receive an email with information, signups, tabling ideas, and more.</i>
<input type="checkbox"/> Check the EAR fund for program deposits	<i>Alternate: EF program faculty should check their EF programs for deposits</i>
<input type="checkbox"/> Touch base with OEA regularly to check on interested students, preapprovals, and anything else you may need	<i>OEA will email regularly with preapproved student list</i>
<input type="checkbox"/> Direct students to OEA to apply for scholarships	

Items you need to complete tasks

- ✓ Marketing materials
- ✓ Study Abroad Fair prep: sign-up sheets, photos or other marketing materials, assistance at your table (student volunteers, co-leaders, or Global Ambassadors)
- ✓ Questions for the Faculty Leader Financial Meeting
- ✓ A review of the Budget and Finance information, Appendix A of the Faculty Handbook
- ✓ Basic knowledge of OEA scholarships (basic = that they exist and students should apply for them)
- ✓ See the *Tips for Recruiting* document on the Office of Education Abroad website (Faculty Section) for more information.

Continue to use your program application and deposit forms from the previous month.

DECEMBER 2021 – JANUARY 2022

Faculty should continue recruiting through the end of the fall semester. Student deposits should be in December, ideally before the end of the term, if they haven't been made before that time. Faculty Leaders should do their best to stay in touch with their current and potential applicants over winter break to keep them excited about the program!

Action – December & January	Notes
<input type="checkbox"/> Finish fall semester recruiting efforts	
<input type="checkbox"/> Reorder marketing materials from OEA to replenish supplies	<i>If needed</i>
<input type="checkbox"/> Let OEA know if you need a little extra help with the final fall semester recruitment	
<input type="checkbox"/> Check EAR fund for program deposits	<i>Alternate: EF program faculty should check their EF programs for deposits</i>
<input type="checkbox"/> Email students who expressed an interest but have not yet committed	
<input type="checkbox"/> Collect applications (with deposits) from committed students, send email confirmation to students	<i>Ongoing</i>
<input type="checkbox"/> Schedule classroom presentations for spring term before the end of the fall semester	
<input type="checkbox"/> Email committed students just before winter break about remainder of upcoming payments, other info	
<input type="checkbox"/> Welcome back email in January when the spring semester begins	
<input type="checkbox"/> Late January – refresh campus displays	<i>OEA will often refresh the OEA displays, but feel free to fill them with your marketing materials as well.</i>
<input type="checkbox"/> Direct students to OEA to apply for scholarships	<i>OEA scholarship deadline is very early February</i>
<input type="checkbox"/> Begin vendor payment process: W-8 or W-9 if needed, any contracts through the MTSU Contracts Office, etc...	<i>See the faculty handbook, Appendix A, budget and financial information for details</i>

Items you need to complete tasks

- ✓ Basic knowledge of OEA scholarships (basic = that they exist and students should apply for them)
- ✓ Student list for emailing
- ✓ Vendor payment information (W-8 or W-9) and if required, contract through the MTSU Contracts Office

With luck, you will have a full program with 8-10 committed students before the fall semester ends. If this occurs, keep a wait list in case anyone drops out (make sure students know they are on the wait list) and email the Office of Education Abroad with your committed student list. Then:

- OEA will close your program to new applications in the system with a note about the wait list
- OEA will compare your final list to the preapproval list and make adjustments or reach out to students as needed

OEA can reopen your program to additional students if needed – per your request – through the preapproval deadline. This is sometimes necessary if a student drops and you need to add someone to the program.

FEBRUARY 2022

By the end of February, the OEA will contact you to ask if your program is running, if you filled all spots, and to request the final participant list. February may see a trickle of new, interested students, but once the OEA Scholarship deadline passes in early February, interest slows down considerably. *You may not know if your program is running quite yet, or you may want to wait until the last minute to finish recruiting and decide, and that is fine. Last minute usually = very early March.*

February is also the time when faculty often make vendor deposits, start planning group flights, and wrap-up recruiting, and start moving forward with final program decisions. Faculty should only make vendor deposits if students are committed to the program and have been making program payments into the EAR fund. Some faculty may be working with a custom-program provider where program payments are online at the provider's website. In these cases, faculty should review the participant list and contact the provider to ensure that student payments are on track. OEA will still reach out to these faculty about wrapping up recruiting and moving forward with the program.

Note: Faculty must begin the vendor payment process in January or February in order to ensure that the Business Office has enough time to process payment. Delays are common if the Faculty Leader does not provide the proper requirements such as W-8 or W-9, invoice, etc... Starting the process early is essential to getting invoices paid on time.

Budget changes

Faculty sometimes have program budget changes in February and March due to changes in program activity availability or other aspects of the program (like museum closings, or transportation issues). Costs may go up or down so faculty may need to adjust budgets. Ideally, reducing costs, since increasing costs is never well-received by students. The VPIA and OEA can help with this process, if needed.

Final list of participants

Why does OEA ask for a final list of participants? First, to ensure that all participants on the faculty list are the same as the OEA list. This ensures that everyone has completed preapproval (mandatory). Second, because the final list allows OEA staff to release the next set of student study abroad requirements, called the pre-departure packet, to students on the program. Finally, because the student list is the one OEA will submit with the corresponding course CRNs to generate faculty pay for the summer course (also very important).

Once your final list is in, OEA will close your program on the website to new applicants. The information will remain but students will not be able to apply.

Faulty Leaders have an option to leave the program open for student preapprovals through the OEA preapproval deadline, if they wish. That is typically very early March.

Action – February	Notes
<input type="checkbox"/> Wrap-up recruiting	
<input type="checkbox"/> Let OEA know if you need a little extra help with the final recruitment	
<input type="checkbox"/> Check EAR fund for program deposits, email students who are behind	<i>Alternate: EF program faculty should check their EF programs for deposits</i>
<input type="checkbox"/> Email students who expressed an interest but have not yet committed	
<input type="checkbox"/> With OEA, remind students of the Office of Education Abroad Scholarship	<i>Deadline is very early February</i>
<input type="checkbox"/> Collect applications (with deposits) from committed students, send email confirmation to students	<i>Ongoing</i>
<input type="checkbox"/> Finalize deposit amounts with vendor(s), get vendor invoice(s) and begin processing through MT\$ource using EAR fund	<i>Direct payments are preferred. See Appendix A of the handbook for budget and financial details</i>
<input type="checkbox"/> Second Faculty Financial Meeting	<i>Highly recommended. Bring your budget, financial, & vendor payment questions!</i>
<input type="checkbox"/> Email or contact committed students. Often first group program meetings occur in February	<i>To discuss program details</i>
<input type="checkbox"/> Close program: Email OEA with final list, CRN information	
<input type="checkbox"/> Add study abroad orientation to calendar if you haven't done so already.	<ul style="list-style-type: none"> • <i>Mandatory for students.</i> • <i>Faculty will receive a reminder email about this in February.</i> • <i>Usually a Saturday morning in very late March or early April.</i>

Items you need to complete tasks

- ✓ Basic knowledge of OEA scholarships (basic = that they exist and students should apply for them)
- ✓ Vendor payment information
- ✓ List of EAR fund deposits and EAR fund total
- ✓ Orientation date

OEA can reopen your program to additional students if needed – per your request – through the preapproval deadline. This is sometimes necessary if a student drops and you need to add someone to the program.

MARCH 2022

By early March, final program decisions are due. Will the program run at full capacity, run with fewer than eight students, or cancel? OEA will ask for your final decision at the beginning of March if you have not already provided that information.

Cancelling is difficult, but if the program does not have enough interest, you need to cancel A.S.A.P. before vendor payments are due. Students may also have a chance to join another program if you cancel early enough.

Running at full capacity (eight minimum) is ideal. Running with less than eight students is possible. You can petition the VPIA for prorated pay if there are six or seven committed students on the program. Prorated pay is not guaranteed. Additionally, if there are fewer students on the program than were originally budgeted for, you'll need to revisit the program budget to ensure it can run with fewer students. Sometimes this means altering plans abroad a bit. Faculty can run a program without pay (if they cannot get prorated pay and want the program to run) and should consult with the VPIA.

Pre-departure packet

In early March, OEA will release the next set of requirements to students called the pre-departure packet.

- These are liability forms that all study abroad participants must complete.
- Like the preapproval process, this packet of items is mandatory for participation in a program.
- There is nothing for faculty leaders to complete with for the pre-departure packet, but students may ask questions; please direct them to the OEA for answers.

The OEA cannot release the pre-departure packet to students until we receive the final participant list from the Faculty Leader.

Course set-up and registration

March is also the month where the study abroad course is setup in Pipeline so students can register. This is coordinated with your department, not the Office of Education Abroad. Study Abroad courses are full summer courses. The summer tuition discount for the course are not automatic so please let students know. Tuition discount questions can be sent to the OEA.

Action - March	Notes
<input type="checkbox"/> Program decision: Run or cancel	
<input type="checkbox"/> CRN information to OEA	<i>If you haven't provided it already</i>
<input type="checkbox"/> Check EAR fund for program payments, email students who are behind	<i>Alternate: EF program faculty should check their EF programs for deposits</i>
<input type="checkbox"/> Schedule program meetings with students	<i>Either after the orientation or other times</i>
<input type="checkbox"/> Finalize deposit amounts with vendor(s), get vendor invoice(s) and begin processing through MTSource using EAR fund	<i>Direct payments are preferred. See Appendix A of the handbook for budget and financial details</i>
<input type="checkbox"/> Add study abroad orientation to calendar if you haven't done so already	<i>Mandatory for students. See the faculty handbook for details.</i>
<input type="checkbox"/> Work with department to establish course in Pipeline so students can register	<i>Email students with registration info once established</i>
<input type="checkbox"/> Pre-departure orientation (if scheduled for March)	<i>If scheduled for March, it will be late March</i>

APRIL 2022

April is the month to wrap everything up! Final program payments are often made during April, students are committed (with probably a few withdrawals), and everyone is moving forward.

Faculty should double-check course registration since it is mandatory that students participating on the program are registered for the course. OEA staff will check registration as well and will email faculty and students with missing registration.

The Emergency Protocols meeting is in April led by the Vice Provost of International Affairs. This is a meeting to go over emergency guidelines and procedures and review policies. This is a mandatory meeting for Faculty Leaders. The OEA will send an email with date/time earlier in the spring term for this event.

April is also the time the OEA holds a make-up orientation for students who legitimately could not attend the main orientation. Legitimately = conflicting scheduled activity, class, work, etc... Faculty should encourage their students to attend the main orientation, but OEA can be flexible to accommodate student schedules.

Office of Education Abroad staff spend quite a bit of time in April trying to catch students with missing requirements. Please remind your students to submit the pre-departure packet items in a timely manner to help us out!

Action - April	Notes
<input type="checkbox"/> Check EAR fund for final program payments, email students who are behind	<i>Alternate: EF program faculty should check their EF programs for deposits</i>
<input type="checkbox"/> Schedule program meetings with students	<i>Either after the orientation or other times</i>
<input type="checkbox"/> Finalize deposit amounts with vendor(s), get vendor invoice(s) and finish processing through MT\$ource using EAR fund	<i>Direct payments are preferred. See Appendix A of the handbook for budget and financial details</i>
<input type="checkbox"/> Double-check program course registration	<i>Faculty responsibility to ensure students are registered for the course</i>
<input type="checkbox"/> Pre-departure orientation (if scheduled for April)	<i>If scheduled for April, it will be early April</i>
<input type="checkbox"/> Faculty Emergency Protocol Meeting with VPIA	<i>Mandatory for faculty</i>

MAY 2022 - AUGUST 2022

Program departures!

Prior to leaving, OEA will provide all Faculty Leaders with an emergency manual called the Faculty Director Notebook. The notebook contains copies of student passports, liability information, medical surrogacy forms, and related items for each student. The notebooks are password protected and emailed to each Faculty Leader a week or two before the program start date.

Faculty must check-in with the VPIA or OEA in some way once their group arrives abroad. Text or email are preferred.

We encourage all Faculty Leaders to take advantage of free publicity for their program by documenting the program on social media. Tag OEA in your social media photos (#mtsustudyabroad) and encourage your students to do the same.