

**Checklist of Faculty-led Programs Responsibilities:
Who does what, and when!**

X = primary √ = secondary						Contact: Kathy Jicinsky, Asst. Director for Faculty-Led Programs: kathy.jicinsky@winona.edu
Activity	Study Abroad	Faculty	TSAC	Business Office	Notes	Timeline/Links
Prior to Proposal Approval						
1	Explore the possibility of leading a program		X			Meet with Asst Director for Faculty-led Programs to understand overall process. Review Faculty Handbook (hard copy or online), review proposal application (online). Study Abroad Website - Faculty Handbook link, proposal application information
2	Look into possibility of applying for exploratory funds to visit a potential program site	X	X			Apply online at least one year prior to submitting the proposal. Contact Asst Director for Faculty-led Programs with questions. Study Abroad Website - Exploratory Application Link
3	Submit report after return from exploratory.		X			Required before reimbursement can occur, and before proposal submission. Exploratory report template is online. Study Abroad Website - Exploratory Report Template
4	Prepare the proposal/plan the academics		X			Collaborate with Asst Director for Faculty-led Programs or other faculty for input/advice. Submit by January 15 deadline (or the Monday immediately following if January 15 is on a weekend)
5	Explore logistics (accommodation, travel, etc.)	X	X			Fac provide info they have gleaned; Study Abroad oversees all logistics. During exploratory process and while developing the proposal. Logistics finalized shortly after proposal approved.
6	Meet with approved travel arrangers organized by Study Abroad	X	X			Faculty are highly encouraged to use travel arrangers who will assist Study Abroad in handling logistics planning to relieve faculty of this burden.
7	Budget formulation	X	√			In collaboration with faculty leader(s) but Study Abroad oversees budget. During exploratory process and while developing the proposal. Course cost range determined after proposal approval and finalized three months prior to departure.
8	Review/approve proposal			X		TSAC reviews within the month following proposal submission. Faculty submitting new proposals are invited to meeting.
After Proposal is Approved						

**Checklist of Faculty-led Programs Responsibilities:
Who does what, and when!**

	<u>Activity</u>	<u>Study Abroad</u>	<u>Faculty</u>	<u>TSAC</u>	<u>Business Office</u>	<u>Notes</u>	<u>Timeline/Links</u>
9	Complete Request for Proposal (RFP) to select travel arranger (if applicable)	X	√		X	If using a travel provider and the payment is greater than \$50,000, an RFP must be conducted prior to selecting a vendor. The Asst Director for Faculty-led Programs will talk with faculty about this and provide information.	
10	Financial Aid Office provided with information on course cost (based on min/max student participants.)	X				Needed for financial aid to advise students on their aid awards relevant to faculty-led programs.	
11	TCF for course(s) associated with program		X				Handled by faculty's department admin.
12	Prepare student application materials/Terra Dotta	X				All applications are completed online, coordinated by Study Abroad.	
13	Marketing & Recruitment	√	X			Study Abroad in conjunction with Creative Services will work with faculty to create a poster and/or brochure. Cost of printing marketing materials comes from course budget. Faculty are encouraged to hold recruiting sessions; Study Abroad office will work with them to reserve space and inform WSU Updates.	Recruitment may begin as soon as TSAC has approved the proposal. Students cannot sign up until all approvals are finalized (Fac Senate, M/C, etc.).
Student Application Procedures							
14	Students apply online and submit confirmation deposit.	X				Deposit applies to the cost of the program and is refunded to the applicant's student acct if students are not selected.	
15	Process applications (Terra Dotta) and review applicants for minimum requirements (GPA, probation, open conduct case, etc.).	X					Within one week of completed application.
16	Follow up with applicants who do not meet minimum requirements.	X					Within one week of completed application.
17	Mark applicants as "ready to review" in Terra Dotta for faculty to review.	X					One week after completed application.

**Checklist of Faculty-led Programs Responsibilities:
Who does what, and when!**

	<u>Activity</u>	<u>Study Abroad</u>	<u>Faculty</u>	<u>TSAC</u>	<u>Business Office</u>	<u>Notes</u>	<u>Timeline/Links</u>
18	Review applications, interview applicants, select participants.		X			Faculty are strongly encouraged to interview applicants before deciding who to accept, waitlist, or deny.	Process completed 2-3 weeks after application but remains ongoing until course is full or is cancelled by 90 days prior to departure.
19	Inform applicants of their status (approved, denied, waitlisted)	X	√			Faculty are encouraged to send follow up email to admitted students.	
20	Student withdrawal deadline	X				Students may not withdraw past this point; they are now responsible for the full program cost regardless of participation.	90 days prior to departure
21	Student course registration	X					
22	Student accounts are billed	X					Billing is finalized 90 days prior to departure.
	Prior to Departure						
23	Book flight, hotels, other logistics	X			X		Refundable deposits put down once proposal approved for max # of students and faculty indicated in proposal. Final bookings completed up to day of departure.
24	Course confirmed as a "go" or is cancelled, depending on student enrollment.	X	√			Course cancelled to avoid additional unreimbursable expenses, and to allow students to choose another open course.	90 days prior to departure
25	Pre-departure orientation - general info	X				Covers generic health, safety, and cultural information and general WSU policy information.	2-6 weeks prior to departure
26	Pre-departure orientation - course specific		X			At least one meeting should be planned prior to departure; faculty are welcome and encouraged to hold more.	
27	State Department registration	X					Completed 60 days prior to departure.
28	Cash advance request	X	√		X	Advances approved only in unusual circumstances. On-site cash will be accessed via WSU credit card.	
29	WSU credit card issued		X		X	Credit card will be used to access on-site ATMs.	New card holders receive card & training 1-3 weeks prior to departure.
30	International health insurance registration	X					Completed 60 days prior to departure.
31	On-site contact info collected for entire itinerary	X				On-site phone, email, and contact names.	

**Checklist of Faculty-led Programs Responsibilities:
Who does what, and when!**

	<u>Activity</u>	<u>Study Abroad</u>	<u>Faculty</u>	<u>TSAC</u>	<u>Business Office</u>	<u>Notes</u>	<u>Timeline/Links</u>
32	Emergency Contact Info collected from faculty leaders	X	√			Local contacts in case of an emergency involving one of the program leaders.	Collected online through study abroad account.
33	Finalize details/process for on-site payments, finances, logistics, receipts, and receive insurance info, receipt logs, and other details.	X	X		X	Meet together to go over all.	During the month prior to departure.
After Departure							
34	While Off-Campus, contact Study Abroad if any unusual event occurs (accident, theft, student illness, etc.).	√	X			Study Abroad mandated reporting responsibilities, and general oversight of health/safety, requires the office is informed regularly.	
Return to Campus							
35	Re-entry gatherings/meetings with students		X			Faculty can build such gatherings into the program budget when doing initial planning.	
36	Program evaluation	X	√			Faculty are asked to encourage students to complete the online evaluation. Results shared with faculty after grades submitted.	Link to assessment sent to students a few days prior to return. Faculty may request a different date for this email if needed within the program design.
37	Faculty turn in all expense sheets, organized itemized receipts, services performed documents, and credit card to Study Abroad.	X	X				Within one week of return.
38	Faculty Narrative Report due from program leaders.		X			Narrative report template is online.	Study Abroad Website - Faculty Narrative Report Template - completed within 3 weeks of return
39	Program account reconciled.	X			X	Timing of reconciliation depends on when course falls in fiscal year, and when students complete their payments.	
40	Faculty may complete Surplus Fund Application to request carry over of a portion of the surplus funds.	X	X			Apps accepted once budget reconciliation has been completed and all expenses paid. No refunds to students will be issued from a surplus.	Within one month of budget reconciliation.
41	Faculty may submit a repeat proposal application if they hope to teach the course again.		X				