Checklist of Faculty-led Programs Responsibilities

	X = primary responsibility √ = secondary responsibility				**Contact:** Kathy Jicinsky, Asst. Director for Faculty-Led Programs (kathy.jicinsky@winona.edu)	
	Activity	**Study Abroad**	**Faculty**	**FLPS**	**Business Office**	**Notes**	**Links**
	Prior to Proposal Approval					
1	Explore the possibility of teaching a faculty-led course		X			Meet with Asst Director for Faculty-led Programs to understand overall process. Review Faculty Handbook, review proposal application.	Study Abroad Faculty Information Website
2	Consider applying for exploratory funds to visit a potential program site	√	X			Yearly application deadline: November 1. Contact Asst Director for Faculty-led Programs with questions.	Exploratory Funding Application
3	Submit report after return from exploratory		X			Required before reimbursement can occur. Exploratory report template is online.	Exploratory Funding Post-Trip Report
4	Develop the faculty-led proposal and plan the academics		X			Yearly proposal deadline: January 15. Collaborate with FLPS, the Asst Director for Faculty-led Programs, and/or other faculty for input and advice	Faculty-led Course Proposal Application
5	Explore logistics (accommodations, travel, etc.)	X	X			Partnership between faculty and Study Abroad on planning program logistics.	
6	Talk with approved third-party providers or travel arrangers	X	X			Faculty are highly encouraged to use third-party providers or travel arrangers who will coordinate the program's logistics and provide on-the-ground-support during the program. Study Abroad will help faculty leaders identify third-party providers or travel arrangers that could support the program.	
7	Faculty-led program budget development	X	√			Study Abroad oversees the program budget and partners with faculty on its development and updates. The program budget is finalized approximately 90 days prior to departure.	
8	Review/approve proposal			X		FLPS reviews faculty-led proposals in February-April.	Proposal Rubric used by FLPS members
	After Proposal is Approved					
9	Complete Request for Proposal (RFP) to select third-party provider or travel arranger (if applicable)	X	√		X	If using a third-party provider or travel provider and the payment is greater than $50,000, an RFP must be conducted. The Asst Director for Faculty-led Programs will talk with faculty about this and coordinate the RFP process with the Business Office.	

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10	Financial Aid Office provided with information on course cost (based on min/max student participants)	X				Asst Director for Faculty-led Programs provides program budgets to Financial Aid so they can advise students on aid options relevant to faculty-led programs.	
11	TCF created for course(s) associated with program		X			Faculty's department is responsible for creating the TCF for the faculty-led course(s).	
12	Develop/update program application website and student applications in Terra Dotta (study abroad software)	X	√			All faculty-led programs have websites within Terra Dotta housing the program applications. All student study abroad applications are created online. The Asst Director for Faculty-led Programs will collaborate with faculty on developing student application components.	
13	Marketing & recruitment	√	X			Recruitment and marketing may begin as soon as FLPS approves the faculty-led proposal. Students cannot apply or pay deposits until the faculty-led proposal is approved by Faculty Senate.	
	Student Application Procedures						
14	Students apply online and submit confirmation deposit	X				Confirmation deposit is applied to the overall program cost.	
15	Process applications and review applicants for minimum requirements (GPA and WSU disciplinary record.)	X				Study Abroad will regularly monitor student applications.	
16	Follow up with applicants who do not meet minimum requirements	X					
17	Mark applicants as "ready to review" in Terra Dotta for faculty to review	X					
18	Review applications, interview applicants, select participants		X			Faculty are strongly encouraged to interview applicants before deciding who to accept, waitlist, or deny.	
19	Inform applicants of their status (approved, denied, waitlisted)	X	√			Faculty are encouraged to send follow up email to admitted students.	
20	Student course registration	X				Study Abroad will register students for the faculty-led course(s)	
21	Student accounts are billed	X				The faculty-led program cost is finalized approximately 90 days prior to departure.	

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	Prior to Departure						
22	Course confirmed as a "go" or is cancelled	X	√			Approximately 90 days prior to departure, the program is reviewed to determine if it is approved to run. Courses may be cancelled due to lack of enrollment, health/safety factors, etc.	
23	Book flights, hotels, other logistics	X			X	Non-refundable bookings can be made after the course is approved to run (approximately 90 days prior to departure).	
24	Faculty pre-departure orientation meeting	X	X			Faculty are required to attend a pre-departure meeting facilitated by Study Abroad prior to facilitating the faculty-led program. Meetings are offered once in the fall and once in the spring. Meeting topics cover health/safety concerns, reporting requirements, and general WSU policy information.	
25	Faculty-led program pre-departure meeting(s) with students		X			Faculty are required to hold at least one pre-departure meeting with students. Faculty are encouraged to hold more than one meeting.	
26	State Department registration	X				Study Abroad registers all students and faculty participating in international programs with STEP.	Smart Traveler Enrollment Program (STEP)
27	WSU credit card issued		X		X	Credit card will be used to make approved program purchases and access cash advances from on-site ATMs.	
28	International health insurance registration	X				Study Abroad purchases international health insurance for all students and faculty participating in international faculty-led programs approximately 60 days prior to departure.	
29	On-site contact info collected for entire itinerary	X	X			A detailed program itinerary is shared including on-site phone, email, and contact names for all visits, partners, etc.	
30	Emergency Contact Info collected from all participants and faculty	X	√			Collected online through Terra Dotta and shared with faculty leaders	
31	Finalize details/process for on-site payments, finances, logistics, receipts, cash advances, etc.	X	X		X	Study Abroad will coordinate a meeting that takes place 1-3 weeks prior to departure to review program and financial details and policies.	

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	After Departure						
32	During the program, 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 of any incidents, crises, accidents, etc.	
	Return to Campus						
33	Re-entry gatherings/meetings with students		X			Faculty can build such gatherings into the program budget when doing initial planning.	
34	Program evaluation	X	√			Study Abroad asks students to complete an online program evaluation. Evaluation comments/scores are shared with faculty after grades are submitted.	
35	Faculty turn in all organized itemized receipts, services performed documents, and credit card to Study Abroad	X	X			Study Abroad will schedule a meeting with the faculty leader(s) to take place 2-5 business days after the program's conclusion to review receipts, complete expense reports, collect the credit card, etc.	
36	Faculty Narrative Report due from program leaders		X			Narrative report template is online and is due within 3 weeks of return.	Faculty Narrative Report Template
37	Program account reconciled	X			X	Timing of reconciliation depends on when course falls in fiscal year, and when students complete their payments.	
38	Faculty may complete Surplus Fund Application if funds remain.	X	X			Surplus applications will be accepted once budget reconciliation has been completed and all expenses paid. No refunds to students will be issued from a surplus.	
39	Faculty may submit a repeat proposal application if they hope to teach the course again.		X			Yearly proposal deadline: January 15.	Faculty-led Course Proposal Application