



CHECKLISTS FOR PHASE ONE: PLAN

For Program Directors

- Attend Education Abroad Program Planning workshop.
- Design a program with full consideration of all components:
 - *Academics*
 - Select learning objectives, activities, and assignments.
 - Determine pre-requisites, degree fulfillments, and number of credits.
 - *Itinerary*
 - Determine tentative program dates, locations, and a flow of excursions and activities.
 - *Logistics*
 - Review academic proposal on Education Abroad website.
 - Draft a list of logistical needs, including airfare and in-country travel plans, lodging arrangements, additional facilities or services needed, and meal plans.
 - Consult with the Education Abroad Coordinator regarding how logistical arrangements should be made and contracts secured.
 - Consider technologies and arrangements available for a direct line of communication with Education Abroad while in-country.
 - *Budget*
 - Review budget template on Education Abroad website.
 - Consult with the International Programs Accountant after reading the budget section of the Handbook for Faculty-Directed Education Abroad Programs.
 - *Group*
 - Consider and select a leadership structure for your program and group size targets in consultation with Education Abroad.

- *Safety*

- Review all arrangements with an eye to their health and safety implications for the group in consultation with Education Abroad and the [Education Abroad Emergency Response Plan](#).

- Produce an integrated syllabus with all required components to submit with program proposal.

For Education Abroad Coordinator

- Host Education Abroad Program Planning workshop.
- Provide program directors with the Education Abroad Program Director Handbook.
- Meet with program directors as requested to assist with design, planning, and the creation of required documents.
- Review program plans developed by the program director and coordinate on further arrangements and contracts needed, including:
 - Academic plans for the program.
 - Flow and design of the itinerary for the program.
 - Logistical needs and proposed arrangements.
 - Plans for leadership and group structure.
 - Health, safety, and liability implications of all planned activities and locations.
 - Proper vetting of any partners and contract arrangements.

For International Programs Accountant

- Meet with program director, as necessary, after program director's review of budget template and budget section of the *Education Abroad Program Director Handbook*.

CHECKLISTS FOR PHASE TWO: ACADEMIC PROPOSAL + BUDGET

For Program Directors

- Include detailed itinerary information in your integrated syllabus that can be used for budgeting and logistical planning.
- Complete academic program proposal and budget, requesting assistance as necessary from the Education Abroad Coordinator, International Programs Accountant, and affiliate program providers.
- Submit a program proposal and budget to the department head, school director, and dean for review prior to the proposal submission deadline. Request that those academic administrators copy the Education Abroad Coordinator on their approval email to the program director.
- Notify MSU's Deputy Compliance Officer if requiring health or disability accommodations on the program.
- Submit academic proposal and budget to the Education Abroad Coordinator by the proposal submission due date.
- Await notification of program approval from the Education Abroad Coordinator, which will be in the form of an appointment email.
- Continue working with Education Abroad to finalize program details ahead of recruitment.
- Work with International Programs Accountant to arrange affiliate program providers and contracts.

For Education Abroad Coordinator

- Advertise the call for proposals for faculty-directed programs each fall including the links to proposal templates and submission deadlines.
- Meet with program director to discuss ideas and initial plans for the development and approval of the program.
- Receive and file approval emails from the program director's department head, school director, and dean.
- Receive proposal.
- Receive emergency response plan approval or edits from the Education Abroad Director.
- Provide proposal feedback.
- Work with program director to finalize program plans.
- If program is approved, send appointment letter.

For International Programs Accountant

- Meet with program director to discuss budget development.
- Review the program director's draft budget.
- Provide feedback on budget.
- Provide guidance for working with affiliate program providers and information regarding salary calculations.
- Work with program director to finalize budget.
- If the budget is approved, send a budget approval email to the program director and Education Abroad Coordinator.
- Complete Foreign Travel Authorization and SET card forms.

CHECKLISTS FOR PHASE THREE: RECRUIT

For Program Directors

- ❑ Complete Education Abroad's program director online workshop on recruitment.
- ❑ Understand [*Digitally Managing Your Education Abroad*](#) document.
- ❑ Develop a marketing plan for recruiting students from the target population for your program.
- ❑ Review the [*Guidelines for Guests & Participants on MSU Faculty-Directed Programs*](#).
- ❑ Engage in a good faith effort to recruit using a range of marketing strategies to recruit the maximum number of participants for your program.
- ❑ Adhere to the policies in the Handbook when communicating with students and refer them to Education Abroad other appropriate offices when information is not known.
- ❑ Review all applications received in a timely fashion.
- ❑ Ensure each applicant has met prerequisites for the course(s) they selected within their application.

For Education Abroad Coordinator

- ❑ Provide online workshop on recruitment.
- ❑ Ensure program director Campus Security Authority (CSA) compliance.
- ❑ Notify program director of enrollment before deadline to verify minimum enrollment; if enrollment is below minimum, program director must recruit additional participants or consider amending budget to travel with fewer participants.
- ❑ Notify program directors and participants when a program has been confirmed through sufficient applicants.

For Education Abroad Team

- ❑ Create an online program brochure and application; send to program director for approval.
- ❑ Provide limited social media marketing, promotional opportunities, and advising.
- ❑ Review all applications received, send acceptance emails and other notifications and reminders.

CHECKLISTS FOR PHASE FOUR: PREP

For Program Directors

- ❑ Sign SET card application prepared by the International Programs Accountant, pick up SET card, and use in accordance with budget items and MSU's Travel policy.
- ❑ Sign Foreign Travel Authorization form prepared by the International Programs Accountant.
- ❑ Establish communication channels for the group where participants connect to leaders and one another before traveling abroad.
- ❑ Confirm if online/out of town students will make their own flight arrangements; confirm with International Programs Accountant.
- ❑ Research essential local information including culture, laws, and emergency resources.
- ❑ Review [Education Abroad Emergency Response Plan](#).
- ❑ Plan, communicate, and host mandatory pre-departure sessions for the group. At least one session should cover behavior expectations, safety, health, insurance, and emergency information.
- ❑ Communicate and verify the attendance of all program participants at mandatory pre-departure sessions.
- ❑ Consult CDC health and vaccination recommendations and healthcare professionals to plan for personal health management; encourage students to do the same.
- ❑ Review all emergency contract information and medical disclosures from student applications.
- ❑ Provide Student Leader name, email, and cell phone number to Education Abroad Coordinator.
- ❑ Attend the mandatory program director pre-departure orientation.
- ❑ Enroll all participants in Smart Traveler Enrollment Program (STEP).

For Global Education and Engagement Coordinator

- ❑ Build program courses and send course information to students.
- ❑ Ensure course enrollment.
- ❑ Enroll all international participants in international health insurance.

For International Programs Accountant

- ❑ Bill students.
- ❑ Apply for the FOAP and SET card.
- ❑ Complete Foreign Travel Authorization Card.
- ❑ Provide program directors with expense reconciliation forms and P-Card forms (if needed) and discuss budget availabilities.
- ❑ Ensure non-SET card payments are made to affiliate program providers.

For Education Abroad Coordinator

- ❑ Communicate payment, refund, scholarship, and voucher information to students and Financial Aid Office.
- ❑ Share date to submit grades with program directors.
- ❑ Create and distribute Behavior Contracts to program directors.
- ❑ Send Student Leader email to student leader.
- ❑ Host pre-departure orientation for program directors.

CHECKLISTS FOR PHASE FIVE: LEAD

For Program Directors

- ❑ Provide initial on-site orientation(s) to introduce students to the host site, culture, and safety information (may be in conjunction with on-site program organizer).
- ❑ Contact Education Abroad within 24 hours of arrival to confirm all participants are safe and accounted for.
- ❑ Keep a line of communication open with Education Abroad (such as Whatsapp, phone, or regularly checked email) by which to receive any safety alerts and updates and by which to send immediate notifications or updates of any critical incidents (including disciplinary, health, and safety issues).
- ❑ Act as a liaison between the students and any individuals or entities providing services to the program. Ensure all onsite cooperating institutions/organizations are delivering services according to established contracts or agreements.
- ❑ Monitor the health and general welfare of all participants.
- ❑ Deliver course content in a manner consistent with planned itinerary and syllabus, while remaining flexible to organic teaching opportunities and group needs.
- ❑ Reinforce group behavioral expectations and administer discipline when needed.
- ❑ Document all critical incidents using the [incident report form](#) or [behavioral incident report form](#) and communicate immediately with the Education Abroad Director.
- ❑ Respond to any emergency situations or serious incidents which may arise using the [Education Abroad Emergency Response Plan](#) and notify the Education Abroad Director of any incident as soon as possible.
- ❑ Spend University funds in accordance with agreed upon budgets, save all receipts, and track all expenses in an orderly fashion, using the provided reconciliation spreadsheet, which will be turned in to Education Abroad at the program's end.
- ❑ Do not loan program funds to participants. Program directors will not be reimbursed by the University for loaning money to participants.

For Education Abroad Director

- ❑ Confirm the safe arrival of all programs at their location within 24 hours of their arrival.
- ❑ Monitor all safety alerts for the location of the program and promptly communicate any developing situations or issues to program director(s).
- ❑ Receive and respond to all communications and incident reports received from program directors and coordinate any necessary collaboration or responses at Missouri State University. Monitor any ongoing situations that have been reported.
- ❑ Notify appropriate administrators in case of any emergencies that arise on the program and follow Education Abroad Emergency Response Plan protocol.
- ❑ Receive and respond to communications from parents/guardians of participants.
- ❑ Generally, be available for assistance to program directors to ensure a smooth, safe, and enjoyable experience for groups abroad.

CHECKLISTS FOR PHASE SIX: REVIEW

For Program Directors

- ❑ Host a final post-program debriefing session for your group; this is often a dinner scheduled for the last day of the program.
- ❑ Establish or keep post-program lines of communication open with your group.
- ❑ Invite your group to share their experiences through media, presentations, or recruiting activities.
- ❑ Complete and submit grades within two weeks of the final date of your program.
- ❑ Submit your SET card and non-SET card expense reconciliations to the International Programs Accountant within two weeks of return.
- ❑ Submit the final report via the link provided to you in the International Programs Accountant post-program email.

For International Programs Accountant

- ❑ Send post-program email reminder outlining program director responsibilities.
- ❑ Review and audit SET card log and non-SET card expense report.

For Education Abroad Coordinator

- ❑ Send program evaluation to students within final three days of program conclusion.
- ❑ Review final report and respond to program director.
- ❑ After student grades are submitted, send aggregate student evaluation to program director and program director's department head or school director.
- ❑ Review final report and respond to program director.