UNDERSTANDING STUDY ABROAD TRIPS

Introduction

Study abroad programs provide students with enriching academic, cultural, and professional experiences. Organizing such programs requires careful planning, coordination, and resource management. The Procurement Team can assist you in ensuring the seamless execution of these trips by assisting with sourcing, purchasing, and managing resources and services needed for the program.

This guide outlines helpful information to assist in organizing and facilitating study abroad trips, ensuring that all logistical, legal, and financial aspects are efficiently handled.

Step 1: Coordination with the Study Abroad Office

Before initiating procurement activities, the organizing department/program should engage in early communication with the Study Abroad Office (SAO) or equivalent department to understand the specific needs and requirements for the trip. They will provide you with contract information, potential suppliers for the trip you have in mind. They will provide you with contract information and program support.

Key Actions:

Establish clear communication: Understand the destinations, dates, group size, and academic objectives.

Identify required resources: Collaborate to determine the specific goods and services needed (e.g., airfare, accommodations, transportation, meals).

Establish budget parameters: Understand the budget available for the trip and ensure that procurement processes remain within those constraints.

Step 2: Coordination with the Provost Office

Study abroad trips require approval and coordination with the Provost Office.

Key Actions:

Contract Review: Work closely with the Provost Office to understand the legal aspects and the financial obligations related to the study abroad program selected. Ensure that all terms, including payment schedules, cancellation policies, and refunds, are clear and fair.

Secure Insurance Coverage: Confirm that the travel insurance provided meets the needs of the trip, covering aspects such as medical emergencies, cancellations, and travel delays.

Finalize Arrangements: Ensure that all necessary arrangements are clearly defined in the contracts, such as flight schedules, hotel accommodations, ground transportation, and meal plans.

Step 3: Coordination with the Bursar's Office

The Bursar's office provides students with an easy and convenient means of paying for their portion of the study abroad trip.

Key Actions:

Create a Marketplace Account: The Marketplace serves as the payment center. Funds collected in the Marketplace are used to make payment to the contracted Study Abroad Program.

Consider the sequencing of deadlines for student payments to allow time for meeting the vendor payment deadline.

Consult with colleagues in other LLCs to discuss their experiences and learn the best way to set up the marketplace for your trip.

Step 4: Budgeting and Understanding Resources

Proper budgeting and payment management are essential to keeping study abroad trips within financial constraints and ensuring that all expenses are handled smoothly.

Key Actions:

Review your department budget: Take account of your available financial resources that could enhance the trip, provide incentives for participation, or reduce the cost for students who participate.

Manage Budgets: Create a detailed procurement budget for all necessary resources (airfare, accommodation, transportation, etc.) based on quotes and contracts.

Monitor Expenditures: Track payments and spending against the approved budget. Ensure that any adjustments or additional costs are communicated to the Study Abroad Office, and that PLEF's are adjusted, if necessary.

Invoice Processing: Handle invoice processing and ensure timely payments to vendors. Maintain a system for managing receipts and payments.

Step 5: How the Procurement Team will Assist

The Divisional Procurement Team will assist university employee travelers with their travel expenses by processing the Travel Authorization Form and seeking reimbursement for their daily per diem and other travel expenses incurred.

The Divisional Procurement Team will assist with obtaining and managing the responsibilities of the Program Expense Card, which was created specifically to address Study Abroad and Research Program needs. For example, the PE Card can be used to pay for student meals, museum fees, and more.