OVERVIEW

This budget handout is intended to accompany the Excel Study Abroad Budget Worksheet (http://www1.udel.edu/global/studyabroad/information/facultychecklist.html)

How is the budget organized?
- Study abroad program budgets are divided into three distinct sections:
  1. STUDENT EXPENSES – covered by the “Program Fee” - the advertised price
  2. FACULTY EXPENSES – covered by tuition, and paid out of IGS budget
  3. PROGRAM EXPENSES – covered by tuition, and paid out of IGS budget

Program Fee – How is this calculated?
- IGS uses the total projected student costs to set an estimated program fee, and eventually the final program fee. This is the advertised fee that every student pays.
- Airfare and UD tuition are not included in the program fee.
- IGS adjusts the total to account for unforeseen student emergencies and last-minute unexpected charges.
- IGS is responsible for setting the estimated and final program fees.

How many students are required?
- The program must be financially feasible.
- This usually requires a minimum of 14 students (single faculty director) or 28 students (two faculty directors).

Can my program have a funded TA (Travel Assistant)?
- Programs with at least 18 students (single faculty director) or 32 students (two faculty directors) may be eligible for an IGS-funded TA. Check with your Program Coordinator to see if your budget can cover a TA.

Family and friend expenses – Will UD cover these?
- No. All family/friend guests are responsible for their own airfare, meals, hotel rooms, admissions fees for excursions, airport shuttles, and any other costs that may result from their presence.

Travel Agents – can we hire them to help?
- Using travel agents (excluding for flights) is not encouraged. Agents often steer groups toward non-academic touristic activities, which drives up program cost for students.
- If a travel agent is absolutely necessary, their role should be limited to coordinating complicated in-country travel. Faculty directors are responsible for creating the itinerary and making the majority of their program’s arrangements.
- Before asking a travel agent for a quote, speak to your Program Coordinator.

What is the IGS Expense per Undergraduate Student?
- This is the amount that IGS has allocated for each student participant. It is generated by dividing the sum of Faculty Expenses and Program Expenses by the number of students. The amount per student may not exceed $1,000 for traditional programs, or $700 for micromesters.

Duration of program – Can the program begin before winter/summer session, or extend beyond?
- No. UD Counsel has liability concerns with programs occurring outside of the term. In addition, IGS and other UD support units are unable to provide emergency services when UD is not in session.
Grades from study abroad programs are due to the Registrar at the same time as courses taught on campus.

**Timing – Can we teach some of our lectures in fall or spring semester?**
- No. Winter/summer coursework should take place during that session only. Requiring winter or summer assignments during fall or spring semester is prohibited.
- Study abroad budgets must cover an appropriate number of days in order to deliver complete course content during that session.

**Courses – How many can we offer on a program?**
- The number of instructors required may impact the program budget. Faculty directors’ S-contracts are paid by their college or department, but the salaries for local (in country) instructors is covered by IGS and charged to your program’s budget.
- UD Micromesters = 1 course (3-4 cr.)
- Standard 5-week study abroad = 2 courses (6-7 cr.)
- Only under certain circumstances will programs include more than the standard number of courses. Exceptions may be granted for language-learning programs, in order to accommodate students’ varying proficiency levels.

# 1. STUDENT EXPENSES

**Group Transportation – what is this?**
Faculty may wish to arrange for a group bus to transport the group from the arrival airport and their lodging, and the reverse. A group bus may also be appropriate for group excursions. At some locations it may be convenient to provide students with a public transit card, or to distribute cash directly to students for this purpose. This should be used for travel to class or program-related activities only.

The program fee does NOT include students’ transportation cost to/from the U.S. departure airport.

**Accommodations – what is appropriate?**
- Students should be provided with SAFE, convenient, and reasonable accommodations.
- Home stays may be used for any program, not only language-learning programs. However, on programs in which student are not fluent in the local language, at least one adult family member should be fluent in English. Homestays should be arranged by a vetted, reputable agency.
- Students are typically housed in apartments, private homes, dorms, hotels, and hostels. Inquire with your cooperating institution – their student housing is often the most reasonably priced.
- Typical accommodations place students in double rooms, but larger rooms and singles, if reasonable, may be considered.

**Excursions – what is appropriate?**
- Most excursions on your program should **directly relate to the academic content** of your courses.
- Also include a few cultural excursions (related to the history, traditions, etc. of the people who live in the country).
- Recreational activities should not be included. Students can do these in their free time, and at their own expense.
Excursions – what exactly should I include in the budget?
- Each excursion is different, but most include:
  - Transportation
  - Admission fees
  - Tour guides
  - Included meal or meals
  - Gratuities – budgeting for this is preferable to asking students to produce cash tips.

Exploratory Excursions – can I use students’ funds to check out excursions on-site (before taking the students)?
- Not in most cases. Reliable information should be available on-line, through personal contacts, guidebooks, or local staff.
- For the rare case where an excursion “preview” would be advisable, the costs would be charged to the excursion budget (shared by students, faculty and assistant).

Last Minute Additional Excursions
- Yes, it is acceptable to budget for this.
- Average additional excursions = $25-$100 per person.
- If you find you have a surplus from the students’ program fee once there, you may spend that on students for allowable items (for example meals, excursions, or cultural events, NOT gifts).

Group Meals – what do I need to know?
- All meals should take place during the program. Do not include pre- or post-program events.
- Program faculty directors receive a per diem for their meals. If you prefer to be included in a group meal, your Program Coordinator will adjust your per diem.

The Farewell Event – what is this?
- This celebratory meal is a way of saying thank you to your hosts and host families, and bringing closure to the students’ experience.
- Students will cover the cost of any invited guests, as well as the faculty meal.
- Even if your program does not spend a significant time in one location, and a farewell event with local guests may not be fitting, you should still plan this event for the benefit of your students.

Meal & Travel Allowances – what are these?
- This category allows you to distribute cash to students and TAs, on site, for meals or travel.
- Disbursements must be documented. IGS provides a form for this which each recipient must sign.

Tips & Gratuities – what is appropriate?
- If you plan to distribute tips or gratuities, include them in your budget, on the appropriate line (hotel tips in Accommodations, bus driver tips in Transportation, tour guide tips in Excursions). This is preferable to asking students to submit cash tips.
- Giving cash as a gratuity is highly location-dependent, and the faculty director should research what the expectations are for their location.

Medical or Other Emergencies – how do I handle these?
- All students and program assistants are covered by GeoBlue Medical Insurance, which often cover allowable expenses by a direct payment to the provider. If not, the student can submit a claim for reimbursement.
In an emergency, if a student cannot pay for transportation, medical care, and/or prescription medicine, you may cover the cost with University funds. The student MUST reimburse the University, preferably directly to the faculty director before the end of the program.

2. FACULTY EXPENSES

Salary – what are faculty paid?
- Overload salary for the courses you teach on the program (see Winter or Summer overload S-contract rates).
- Each program receives a 1-credit administrative supplement to help cover time spent managing and organizing your program.

If I have a co-director, who gets the 1 cr. admin supplement?
- This varies by program. Some faculty share the responsibility of managing program tasks, and thus share the 1 cr. salary. Other programs have one faculty take a lead role. Discuss this with your co-director. Whatever you decide, inform your department before they issue your S-contract.

If my program has a Travel Assistant (TA), what’s covered?
- TAs receive everything that is included in the students’ program fee, including cash disbursements. However, TAs are paid with IGS funds; student funds are not applied to Travel Assistant.
- In addition: round trip airfare and, wherever feasible, a single room (ideally TAs do not share rooms with the students).
- TAs DO NOT receive a per diem, U.S. airport transfers, or taxi funds.

Medical Insurance – it’s included in the students’ program fee; is it covered for faculty?
- Yes. The policy covers you from the group’s day of departure to the group’s day of return to the U.S. (same as students and TAs).
- Faculty are eligible to purchase additional coverage from GeoBlue.
- TAs are also covered, just as the students are.

Flights – how much to budget, and what’s covered?
- IGS will purchase the plane tickets for the faculty and TA.
- Until a price is confirmed, use a rough estimate found on-line for a reasonably priced economy fare ticket.
- IGS will cover up to two checked bags for each faculty. If the airline charges for luggage, include the costs in your budget.
- IGS will cover the cost of a standard seat in economy class. IGS does not cover the cost of any upgrades, or higher fares resulting from faculty flying outside of the program dates.

Domestic Airport Transfers – what are my options and how much?
- IGS will cover faculty transportation to and from the U.S. airport (not covered for students or TAs).
- Option 1: Delaware Express with UD discount
  o Standard shuttle to local airports. IGS sets a maximum for regional airports (see the Budget Worksheet).
  o If you opt for an upgrade, you must pay the difference.
- Option 2: Round-trip mileage and tolls between your home and the airport.
- Option 3: Public transportation if feasible (e.g. train to Newark, NJ airport).
Can I travel early or stay late?
- If you travel before and/or after the group, you are responsible for all expenses (accommodations/meals/transport etc.) on the non-program days.

Accommodations – what will UD cover?
- For faculty, UD covers a single hotel room or a one-bedroom apartment. Spouses and family may be included within this allowance.
- Additional fees resulting from extra family or friends will not be covered by UD.
- Top priorities = safety, affordability, and convenient location.
- If single hotel rooms in this location are extremely small, UD will cover “double occupancy / single use.”
- Room service, laundry, entertainment and other extra services are not covered by IGS funds. These are the responsibility of the individual faculty director.

Excursions – how do we budget these for faculty?
- Use the same amounts used for students.
- If there is a flat charge, this is divided equally across students, faculty and assistants.
- If faculty costs are “comped”, the savings belong in the faculty column, not shared across the group.

Per Diem – What does it cover & how is it calculated?
- Per diem funds offset your daily living expenses (excluding lodging). No receipts are required for per diem expenditures.
- IGS will calculate your per diem. UD travel study per diems are based on the U.S. Department of State MI&E rates as follows:
  - 40% when accommodations include a kitchen
  - 50% for faculty staying in a hotel with no kitchen facilities
- If specific meals are included with accommodations or as part of an excursion, or as part of a package, IGS will subtract these meals from your per diem.
- DO NOT bring foreign currency back to the U.S. IGS cannot accept it.

3. PROGRAM EXPENSES

Immunizations and other Miscellaneous Expenses
- If your site requires extensive immunizations, note it here. IGS covers the expense for faculty only.
- IGS does not cover routine immunizations such as tetanus boosters or flu shots.
- If your program requires a visa, note it here. IGS covers visa costs for faculty only.
- For students and TAs, include the visa fee in the program fee only if you plan to collect and submit all visa applications on behalf of your group.
- If your location charges a departure tax, note it here.

Foreign Instructors – Do all programs have these?
- No. Most courses are taught by UD faculty.
- But they can be a good option for programs with one faculty director. Discuss this with your Program Coordinator.
- Salary ranges widely depending on the credentials of the individual and salary standards in the host country.

Guest Lecturer vs. Tour Guide?
- Guest Lecturer = someone who visits your usual classroom (honorarium paid out of IGS budget).
Tour Guide = someone who joins you on an excursion, or whom the group travels to see (costs paid by students, within the program fee).

Guest Lecturers – How many to include, and how much to pay?
- Average = 3-5 speakers, each paid $100-250.
- Average guest speaker budget = $300 - $700.
- Honoraria range widely depending on the credentials of the individual, the role they play in the program, and the standards for honoraria in the host country.
- Unless they have been paid in advance, guest speakers are required to sign a receipt when paid by you. IGS provides receipts for this purpose.

Supplies – What does this cover?
- This category refers to consumable supplies (such as paper, copies, exam booklets).
- IGS does not cover:
  - tour books, maps, souvenir guides, etc.
  - personal items (passport, travel clock, electric plug adapter, reading lamp, etc.)
  - departmental teaching or technology materials, tools or books
- Average supplies budget = $50-150.

Communications – How much, and how can this be used?
- Average communications budget = $150-200.
- This category covers program related phone, data, and Internet access.
- Most faculty directors take their U.S. cell phone with them abroad.
- If this is not an option, rent a cell phone abroad rather than buying one (as phones quickly become outdated).

Postage – How much, and how can this be used?
- This category covers the cost of shipping textbooks or teaching materials to or home from your program site.
- Please plan ahead when using this category. IGS will not reimburse for Fed Ex or other overnight carriers.

Host hospitality – How much, and how can this be used?
- Average hospitality budget = $150-200.
- This category covers small gifts or tokens of appreciation and meals for program HOSTS (not University employees, family members, students or TAs).
- Funds may not be used to purchase alcohol, per UD policy.
- Funds may not be used on any University student or employee.

What are the bank fees for?
- These are charged on all foreign transactions and cash withdrawals. Other bank fees come from wire charges or credit card transaction fees.
- IGS sets a standard allowance for bank fees. Faculty directors do not need to be overly concerned with bank fees, although faculty should save and submit ATM receipts whenever possible.

Room Rental?
- It is not uncommon to be charged a fee for the rooms where you will be holding class. IGS covers the cost of classroom rental, though very high fees may necessitate a larger group size.