A. Budget Form Completion guidelines

The purpose of this section is to provide guidance for all the academic program directors (APDs) who are in the process of determining program costs, and to ensure consistency and budget accuracy for study abroad faculty-led programs.

All APDs are required to follow these guidelines when preparing a program’s budget. The budget form is broken down into the following categories:

I. Student travel expenses
   • Student airfare to/from program site
   • Student local transportation
     o Bus rental
     o Taxis
     o Shuttle
     o Subway/bus pass
   • Student train pass
   • Student airfare (in country)
   • Student excursions
   • Group activities during the program
   • Group activities before and/or after the program
   • Student lodging
   • Student meals
   • Other

II. Host institution/Program provider fees
   • Program fees

III. Faculty expenses
   • Airfare
   • Lodging at main location
   • Lodging during excursions
   • Per diem
   • Transportation
   • International SOS (ISOS) for faculty
   • HTH health insurance for faculty
   • Other

IV. Assistant expenses
   • Airfare
   • Lodging at main location
   • Lodging during excursions
   • Per diem
   • Transportation
   • ISOS for program assistant
   • HTH for program assistant
   • Stipend
V. Operating expenses
- Duplicating/office supplies
- Courier services
- Bank fees
- Telephone
- Computing time
- Other

VI. Texas State fees
- Texas State instruction fees (tuition)
- Study abroad application fee ($200)
- ISOS for students
- HTH for students

VII. Other expenses
- Guest lectures fees
- Gifts
- Required gratuities/service fees
- Emergency funds
- Foreign currency fluctuation adjustment
- Other

It is recommended that the minimum number of students per faculty member not be below 10, and the maximum not be above 15.

It is expected that in addition to these budget lines there may be some expenses specific to each program. Those expenses need to be clearly identified in the appropriate budget line. Expenses not indicated in the budget form will not be covered by the Texas State Study Abroad Office.

**Student travel expenses**

- **Students airfare.** Group travel for Texas State faculty-led programs is not required, and is usually not recommended. If airfare will be included, you must provide the justification in writing attached to your budget. Consider all taxes and fees associated with the airfare.

- **Local transportation.**
  
  a. Bus rental: Some APDs may opt to use pre-arranged group transportation. This option may be more appropriate for large groups.
  b. Taxi/Shuttle: APDs may decide to use taxis or a shuttle service for local transportation to/from the airport or for official program activities.
  c. Subway/bus pass: Students are encouraged to interact with the local culture as much as possible. Arranging their own local transportation can be a good learning experience. However, APDs may elect to pre-buy subway/bus passes to facilitate the logistics of the program.

- **Train pass.** In some locations transportation by train from city to city may be necessary for program-related activities. Pre-arrival booking/payment can provide significant logistical benefits and minimize financial risk.
• **On-site airfare.** In some cases air travel may be necessary in-country or between countries. Pre-arrival booking/payment can provide significant benefits to the logistics and minimize financial risk.

• **Excursions.** All excursions included in the program must have either an academic purpose or a cultural component tied to the program objectives. A breakdown of the excursions must be outlined and attached to the budget. All excursions must be completed within the program dates. Excursions outside those dates are the responsibility of the APD and are not sponsored by the Texas State Study Abroad Office. Funds will not be collected by this office for optional excursions outside of the program dates. If you decide to sponsor the activity, you will need to make separate arrangements for health insurance for participating students and faculty for those dates.

• **Group activities before and/or after the program.** Any pre-departure activities or post-arrival activities such as group gatherings can also be included in the budget. Make sure you consider rental of facilities, food, service fees, etc.

• **Group activities during the program.** Any group activities while abroad should be included in this line. An example of these activities is a group meal that may involve food, party supplies, rental fee, etc. Faculty meals should be excluded from this receipt due to per diem arrangements.

• **Student lodging.** Indicate if there is an additional fee for private accommodations. Consider the possibility of having an uneven number of female and male participants or students who may want/need a single room, which may impact the number of rooms required.

• **Meals.** Student meals will be included in the program cost collected by the Study Abroad Office only if this is indeed the best choice for the students; otherwise, meals should be excluded from the program, and the students should pay for them on their own.

**Host institution/Program provider**

• **Program fees.** Any fees charged by the host institution. Please indicate what’s included. If any of these services are item lines on the budget form, please add a comment stating “included in program provider”.

**Faculty/assistant expenses**
• **Faculty/assistant airfare.**
  a) Faculty are welcome to make their own airline reservations. However, due to processing time, faculty/assistants must provide a minimum of 10 business days for staff to process payment of airfare. Faculty/assistants may elect to use Ascot Travel or National Travel Service, who provide the option of direct billing to Texas State. Faculty/assistants should not buy their airline tickets before confirming that the minimum number of students for the program to make has been met.
  b) If time or other constraints do not allow you to follow the above process, the faculty member/assistant will need to purchase airline tickets and then request reimbursement for the tickets.

A complete itinerary is required, and tickets must be in coach/tourist class. Any difference in cost such as an upgraded class must be covered by the faculty member/assistant. In some cases faculty may have some specific circumstances that affect their travel plans such as travel dates or flying from/to a different destination. Any special request must be submitted in writing to the Study Abroad Office; every reasonable consideration will be made to accommodate the faculty’s request, however, the faculty member/assistant will be responsible for any additional cost associated with their special request.

Emergency travel. If for some reason you are required to return before the program ends, for example a family emergency, you will be responsible for any additional cost, including your airline ticket.

• **Faculty/assistant lodging.** Include all accommodations such as those for excursions. Any additional cost due to special accommodations must be covered by the faculty member and cannot be included in the program’s budget.

• **Faculty/assistant per diem.** Faculty will determine a reasonable amount for meals and incidentals not to exceed the rates allowed by the Department of State. The amount of per diem will not be increased if more students than the minimum enroll in the program. Receipts are not required for per diem expenses.

• **Faculty/assistant transportation.** APDs may include the cost of transportation to/from the airport. If using personal vehicle, Texas State mileage guidelines will be followed. The cost of on-site local transportation should also be considered.

• **ISOS for faculty and program assistants.** All Texas State faculty and program assistant(s) must be covered by ISOS. The cost of ISOS may vary from year to year so visit the Study Abroad Office website for fee updates.
• **HTH medical insurance for faculty and program assistant(s).** Faculty may elect to include the cost of HTH in their program budget. Visit the Study Abroad Office website for fee updates.

• **Stipend for program assistant.** The stipend amounts vary from program to program. In some cases the program assistant may not receive a stipend, but have all travel expenses covered. If the program assistant is currently employed at Texas State as a graduate assistant, the stipend will be determined following Texas State policies and procedures associated with this employment classification.

**Operating expenses**

• **Duplicating/office supplies.** APDs may request copy cards from the Study Abroad Office, or request materials be photocopied. Photocopies and office supplies may also be needed on-site.

• **Courier services.** In some programs students are required to fill out forms to be sent to the program provider. Sometimes checks or documents are sent via courier. These types of charges must be included in the program’s budget. These fees may range from $15 to $100 per packet, depending on the weight and destination.

• **Bank fees.** For every check requested in a foreign currency, as well as for every wire transfer payment, Texas State is charged a fee of $5 (subject to change).

• **Telephone.** Fees associated with the use of a phone for program-related calls while abroad should be added to the budget.

• **Computing time at your program’s site.** In some cases, APDs may need to use cyber cafes to gain access to Internet services, so you may need to calculate the hourly cost of this type of service and add it to your budget.

**Texas State fees**

• **Texas State instruction fees.** These fees must reflect current-year tuition and include other applicable fees. Visit the Study Abroad Office website for fee updates.

• **Study abroad application fee.** $200 (subject to change).
• **ISOS for students.** All Texas State students must be covered by ISOS. The cost for ISOS may vary from year to year, visit the Study Abroad Office website for updated information.

• **HTH health insurance for students.** All students must be covered with HTH health insurance. Visit the Study Abroad Office website for fee updates.

• **Director’s fee.** Faculty who are running a multi-discipline program or are under a 12-month contract may, at their discretion, add a director’s fee up to $100 per student. In cases where there are two or more APDs in a program who qualify, and who are interested in receiving this additional fee, the director’s fee may be split accordingly. The director’s fee shall not exceed $100 per student, per program.

**Other expenses**

• **Guest lecture fees.** In some cases APDs may have the opportunity to hire guest lecturers. If a stipend for their service is required, payment is usually made on site and in cash.

• **Gifts.** In some cultures appreciation gifts are common. It is expected that some of the APDs may want to show appreciation to the different people who were involved in preparing the program. Reasonable cost for gifts can be added to the budget. Some recommendations for gifts are Texas State items from the University bookstore or Texas souvenirs, such as folk music, books, etc.

• **Required gratuities/Service fees.** In some cases the services of bus drivers, porters, etc. require additional fees. You may add an estimated amount for these services.

• **Emergency funds.** Although things are planned as best as possible, unexpected situations may be encountered. It is recommended to add a cushion for any kind of unanticipated situations that may financially impact the cost of the program.

• **Foreign currency fluctuation adjustment.** Add 10% to the total cost of the program to prevent loss due to currency exchange rate fluctuations.
B. Budget Form Completion Instructions

Please follow these instructions when completing your budget form:

- If a budget line does not apply to your program, do NOT leave that space blank; write “N/A” instead.

- Expenses not indicated in your budget will not be covered by the Texas State Study Abroad Office.

- Attach any required information.

- Your budget needs to be reviewed by the Texas State Study Abroad Office director/staff for approval.

- For financial aid purposes, at the end of the form please specify the following costs if not included in your program budget (in US dollars):
  
  - Estimated budget for meals
  - Estimated budget for local transportation
  - Estimated budget for airfare
  - Estimated budget for books and supplies

- Please sign the budget form in the appropriate line.

- When a budget line item is included in the fee paid to the host institution/program provider, please add a note in the column for comments indicating “included in host institution/provider fee”.