



Office of Distance and Extended Learning Budget Form Completion Guidelines

The purpose of this information is to provide guidance for academic program directors (APDs) that are in the process of determining program costs, and to ensure consistency and budget accuracy for Study-in-America/Off-Campus faculty-led programs.

Follow these guidelines when preparing the budget for a program. The budget form is broken down into the following categories:

- I. Student travel expenses
 - Student airfare to/from program site
 - Student transportation
 - Bus or van rental
 - Taxi
 - Shuttle
 - Subway/bus/train pass
 - Student excursions
 - Group activities during the program
 - Group activities before and/or after the program
 - Student lodging
 - Student meals
 - Other
- II. Host institution or Program Provider's fees
 - Rental of facilities
 - Other services
- III. Faculty expenses
 - Airfare
 - Lodging at main location
 - Lodging during excursions
 - Per diem (meals and incidentals)
 - Transportation
 - Other

- IV. Assistant expenses
 - Airfare
 - Lodging at main location
 - Lodging during excursions
 - Per diem (meals and incidentals)
 - Transportation
 - Stipend
 - Other
- V. Operating expenses
 - Brochures/printing
 - Duplicating/office supplies
 - Courier services
 - Bank fees
 - Telephone
 - Other
- VI. Texas State fees
 - Texas State course tuition
- VII. Other expenses
 - Guest lecture fees
 - Gifts
 - Tips
 - Emergency funds
 - Other

It is recommended that the minimum number of students per faculty member be no lower than 10, and no higher than 15.

It is expected that in addition to these budget lines there may be some expenses specific to each program. These expenses need to be clearly identified in the appropriate budget line. The Texas State Office of Distance and Extended Learning (ODEL) will not cover expenses that are not indicated in the program budget.

Student Travel Expenses

- **Student airfare.** Group travel for Texas State faculty-led programs is not required, and is usually not recommended. If airfare will be included, 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 community as much as possible, and arranging their own local

transportation can be a good learning experience. However, APDs may elect to pre-purchase 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.
- **Excursions.** All excursions included in the program must have either an academic purpose or benefit 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 Study-in-America/Off-Campus Program. Funds will not be collected by the ODEL for optional excursions that will occur outside of the program dates. If you decide to sponsor the activity, you will need to make the necessary arrangements.
- **Group activities before and/or after the program.** Any pre-departure activities or post-arrival activities can also be included in the budget. Make sure you consider rental of facilities, food, drinks, etc.
- **Group activities during the program.** Any group activities should be included in this line. An example of these activities would be a group meal that involves food, party supplies, rental fee, etc. Faculty meals should be excluded from this receipt due to per diem arrangements.
- **Student lodging.** The APD must 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 only if including meals 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

- **Tuition.** Any instructional fees charged by the host institution.
- **Rental of classroom space/use of facilities.** Any office/meeting space, classroom, library fee, computer lab fee, ID card, etc.
- **Other services.** Laundry, photocopying, etc.

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 at least 10 days for staff to process payment of airfare, unless you elect to use Ascot Travel for your reservations. 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. 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 ODEL; every reasonable consideration will be made to accommodate the faculty's 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.** APDs, faculty, and program assistants may receive per diem for each travel day within the program, with a calculation of 75% of the per diem meal rate for the first and last days of travel. Program meals with students that are included in the program or covered by the program fee are deducted from the per diem calculation. Use the GSA per diem rates (<https://www.gsa.gov/travel/plan-book/per-diem-rates>) to calculate per diem. 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, faculty, and program assistants 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 be included in your per diem.
- **Stipend for program assistant.** The stipend amounts vary from program to program, depending on the following factors. If the academic unit hires the program assistant as a graduate assistant for the term in which the program is offered, then the program assistant does not normally receive an additional stipend for Study in America but does have all travel expenses covered. If the program assistant is hired by ODEL and does not instruct courses in the program, then the assistant is normally compensated \$100 per day for program travel days (including weekends and holidays), plus \$50 per school day (not including weekends and holidays) that are additional days within the part of term. The \$50-per-day on campus only applies if assistants provide program assistance beyond the field portion of the program.

Operating Expenses

- **Brochures.** APDs may contact ODEL for assistance.
- **Duplicating/office supplies.** APDs may contact ODEL for assistance. 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.
- **Computing time at your program's site.** In some cases, APDs may need to gain access to Internet services that require a fee, so you may need to calculate the hourly cost of this type of service and add it to your budget.

Texas State Tuition Fees

- **Texas State tuition fees.** Contact ODEL for current tuition rates.

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 instances appreciation gifts may be needed. 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.
- **Tips.** In some cases the services of bus drivers, porters, etc. are required. You may add an estimated amount for tips, with a maximum of 20%, for these types of service providers.
- **Emergency funds.** Even with good planning, unexpected situations may be encountered. It is recommended to add reserve/emergency funds for any kind of unanticipated situations that may financially impact the cost of the program.

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” in the column for comments instead.
- The ODEL will not cover expenses that are not indicated in the budget form.
- Attach any required information.
- Your budget needs to be reviewed by the ODEL director/staff for approval.
- Please specify the following costs if not included in your program budget:

- Estimated budget for meals
- Estimated budget for local transportation
- Estimated budget for airfare
- Estimated budget for books and supplies