



International Programs

Guidelines Regarding Budget, Program Fees and Other Expenses

Consider these guidelines when designing your program and completing the *Faculty-led Study Abroad Program Budget* form. Contact Mark Gallovic (gallovicm@uncw.edu) or Anika Nathan (wootena@uncw.edu) by e-mail or phone (2-3685) with any program budgetary questions or concerns.

Program Related Costs

There may be various participant costs associated with a study abroad program:

- 1) **The Program Fee:** This includes all costs that you wish to build into a fee to cover program components (housing, excursions, local transportation, meals, as well as health insurance and the program leader's expenses). Inclusions and exclusions vary by program and OIP is available to advise as needed. Once the Budget and Program Roster are finalized, the program fee will be charged to participants through their student accounts.
- 2) **UNCW Tuition and Fees:** These will be charged to participants enrolled in any *UNCW* course(s) associated with your program, per *UNCW* in-state and out-of-state *extension* tuition and fees for summer programs and standard *UNCW* in-state and out-of-state tuition rates and fees for programs associated with other terms. Tuition is *not* packaged together with the program fee, but noted as an additional cost participants will incur.
- 3) **Flights:** The program leader may choose whether or not to facilitate flight arrangements for participants. If a group flight is offered this is arranged directly between the program leader, the travel agency and the students. These costs are *not* calculated into the program fee, unless the program is being arranged through a customized program operator or tour conductor who takes care of all flight arrangements, and incorporates flight costs into the larger pre-determined program fee they will charge to *UNCW*.
- 4) **Additional Out-of pocket Expenses** It is important to note all additional costs so students can plan accordingly and so Financial Aid can consider the overall costs towards one's aid package and have a sense of total "bottom line" costs for the program and time abroad. Common out-of pocket expenses not included in the official program fee but that students will need to cover include: *UNCW* tuition, flights, books, obtaining a passport/visa, any meals or local transportation beyond those in the program fee. You will represent these in the last section of the *Faculty-led Study Abroad Program Budget* form described in more detail below.

Faculty-led Study Abroad Program Budget Form

- Is used to identify:
 - faculty travelers associated with the program for whom certain travel costs will be built into the program fee and what those costs will be.
 - what costs associated with being abroad and program activities are built into the program fee (this varies by program and typically includes costs such as local transport, accommodation, classroom rental, select meals, etc)
 - costs which students may expect to incur which are included in the program fee (e.g. *UNCW* tuition, international flight, certain meals, books, etc). These are represented in the Cost of Attendance section at the end of the template.
 - key details that will be needed in order to support pre-payments, provide faculty travelers with travel advances, etc.
- Is a required component of a faculty-led program proposal to represent the best estimates available at that time regarding program costs, dates, exchange rates etc.

- Is ultimately used to document all final program related costs and final program fee charged by UNCW to the program participants.

Completing the Faculty-led Study Abroad Program Budget Form

Follow this step-by-step guide to completing the budget form.

Level of Completion

- The version you submit with the proposal should be dated under “First Draft” and should represent the best estimates available at that time regarding program costs, dates, exchange rates etc.
- This program fee estimate can then be used in program promotion but clearly conveyed as “estimated”. One can expect these figures to change somewhat.

General Information

- This section is completed to show the program name, location(s), who will be travelling with the students and the UNCW term to which the academic component is associated.
- Leave the Program Leader II fields blank if there is only one. Contact OIP if there is to be a third faculty traveler.
- The number of Program days will be used to auto-calculate insurance charges below.
- Not all program leaders are on business travel for the same number of days as the students so their travel days are asked for separately to calculate their insurance charge accurately.
- The estimated number of participants noted here will be used for many auto-calculations below. Try to find a conservative balance point between estimating too low, and having the program fee too expensive and too high, and having to increase the program fee if your participant number falls short of that.
- If any program costs represented in program budget will be charged to UNCW in a foreign currency, please note the currency at the bottom of this section and the exchange rate you used to determine the U.S. dollar values in the sections below.
 - Conversion Rates can be viewed through the currency tools at: www.Oanda.com. The “FX Cheat Sheet” feature allows one to specify the margin. Consider conservatively cushioning the currency conversion (such as today’s interbank rate + 15-20%).

The costs in the budget are then represented in two main sections:

- 1) Faculty travel Costs
- 2) All other costs associated with the Participants (housing, meals, activities, supplies, etc)

NOTES:

- Enter the total expense amount into each budget category. The template will then auto-calculate the per student costs based on the estimated number for participants entered in the first section.
- If you are working with a program provider or tour conductor which provides a package of services and expenses, ask them to provide an itemized quote (and eventually invoice). This may include items such as accommodation, ground transportation, tour guides, etc. In such cases, it is not necessary to break apart their budget and put each of these expenses into separate budget categories on the UNCW budget template, as long as their itemized quote is referenced in the budget and attached. For example:

Itemized Breakdown	Amount in U.S. Dollars
1) ABC Tour Company Program Fee (See itemized invoice attached)	\$24,000.00

- You may put N/A in any budget section for which you have no expenses. For example, you may require no “*Supplies*”

Faculty Support Costs

- Represents costs associated with any UNCW faculty traveling with the program.
- The budget form is set to show total faculty travel costs, divided by the estimated number of students. For example, if one faculty leader has a total expense of \$1600 in travel costs and the budget is based on an estimate of 16 students, the budget form will auto-calculate the program fee to include \$100/student to cover these costs.
- **Foreign Per Diems:** All faculty traveling with a program may receive a Per Diem. Given that the costs for this are built into the students' program fee, we try to keep costs reasonable while still ample to realistically cover program leader meals and local transportation appropriate for the nature of program and the itinerary. You may select the per diem amount to include in your budget up to 66% of the Department of State foreign per diem "M&IE" rates found at: http://aoprals.state.gov/web920/per_diem.asp
- **Per Diem:** Complete the green boxes first in order to document per diem expenses. The per diem total will auto-calculate for you in the purple boxes.
- Enter **Lodging** costs and any **Miscellaneous** directly into the purple boxes

Academic Costs

- This does not include UNCW tuition. This may include honoraria for local lecturer(s); classroom rental; photocopying; host-school tuition; and teaching-related expenses.

Participant Transportation Costs

- Does include local public transportation; and travel to and from the airport.
- Does not include faculty leader transportation costs.
- Does not normally include international airfare. The only time international airfare is included in the program fee budget for participants is when it is included as part of a larger package being organized and paid through a program provider or tour operator.

Participant Housing

- Include costs for accommodations for the duration of the trip including any accommodations for overnight excursions.
- If any of these costs are going to be paid in a foreign currency, remember to note the currency and conservatively estimated exchange rate in the *General Information* section of the budget. While the amount should be provided in U.S. dollars in the section, it will be helpful to make a notation in the item description if it is to ultimately be paid in a foreign currency.

Meals

- Indicate which meals are included in the program fee. Only include meals which you commit to providing and for which you will submit group receipts.
- There may be other meals for which students are directly responsible. A costs estimate for these should not be noted here, but in the *Cost of Attendance* section of the budget.
- You may stay at a hotel that includes breakfast. If the costs for this are included in the item noted in the *Participant Housing* section, do not repeat it here.

Activities

- Indicate costs associated with activities, which are not represented elsewhere in the budget. For example, this may include:
 - Museum entrance fees
 - Tickets for cultural events or productions
 - Excursions, including cost of guides, admission and transportation (not represented elsewhere)

Supplies

- Costs for supplies that will be required for teaching or conducting activities.

- It is recommended that you do not budget for a textbook here as that suggests that you will buy the textbooks and supply them to each student yet they would remain the property of UNCW. Alternatively, noting a required textbook in the *Cost of Attendance* section, forewarns students of this cost but it remains their responsibility to obtain the book.
- These supplies remain the property of UNCW

Other

- Indicate other expenses that do not fit into other categories. Examples include:
 - First aid kit
 - Estimated telephone charges
 - Postage
 - Bank and wire fees
 - Credit card foreign transaction surcharges
 - Gratuities (must keep a detailed (e.g. Excel) log of all tips which will not appear on a receipt)

Standard Fees

- The following fees must be included in every education abroad program fee:
 - International Program Support Fee
 - This fee helps to cover orientation materials, flier publication costs, global cell phones, etc
 - \$15 for each student, based on the number estimated on the budget, is made available to program leaders to use for program promotion, to cushion the budget or at one's discretion for program related expenses.
 - Participant Study Abroad Insurance
- This section will auto-calculate

Program Totals

- This amount is the estimated “program fee”, and should be noted as an estimate on promotional materials until the budget marked “final” is submitted to OIP.
- The Program fee on the final budget is the charge (less the pre-paid deposit) placed on the students' UNCW accounts (in addition to the tuition charges for any associated UNCW courses)

Cost Attendance

- For planning purposes and financial aid, OIP will itemize a cost of attendance sheet to include the program fee and all anticipated costs for students. Besides the program fee and any UNCW tuition/fees, it is important to complete this section to note what additional expenses students will be expected to cover?
- Program promotion should not just advertise the program fee and inclusions, but these exclusions and estimated costs.

For guidance, feel free to contact Mark Gallovic at gallovicm@uncw.edu, or Anika Nathan at wootena@uncw.edu, or 910-962-3685.