

OREGON INSTITUTE OF TECHNOLOGY

Risk Management Consultation Workflow

Study Abroad Program Review Process
Office of Global Engagement and Study Abroad

Purpose

This workflow defines how risk management consultation is integrated into the study abroad proposal review process at Oregon Institute of Technology. It establishes clear responsibilities, decision points, and escalation paths — ensuring that the Procurement and Risk Officer (PACS) is engaged at the right moments and that all programs meet OIT's health and safety standards before approval.

This workflow should be read alongside the OIT Health & Safety Policy for International Travel and the Study Abroad Program Application & Approval Form.

Roles in This Workflow

Role	Responsibility in Workflow
Faculty Program Lead	Submits the Study Abroad Program Application & Approval Form. Provides all required information for risk assessment. Leads pre-departure student briefing.
Coordinator, Office of Global Engagement and Study Abroad	Receives and reviews all proposals. Checks destination advisory levels. Coordinates PACS notification and insurance enrollment. Monitors advisory levels during active programs.
PACS / Procurement and Risk Officer	Primary risk management contact. Binds travel insurance through Gallagher. Consulted on Level 3 risk mitigation plans. Receives participant rosters at least 4 weeks before departure.
Department Chair & College Dean	Complete departmental review rubric. Confirm academic quality, logistics, and faculty qualifications before forwarding to Global Education Committee.
Global Education Committee	Reviews proposals against institutional rubric. Considering equity, sustainability, partnerships, and risk. Recommends approval, modification, or denial to Provost.
Provost's Office	Final approving authority. Conducts additional review for Level 3 destinations. Issues formal approval or denial.

Step-by-Step Workflow

Steps marked with ■ PACS/Risk indicate mandatory PACS consultation or action points. These steps may not be skipped regardless of destination risk level.

#	Stage / Responsible Party	Actions & Risk Considerations
---	---------------------------	-------------------------------

1	Faculty submits proposal <i>Faculty Program Lead</i> Deadline: October 1	Complete and submit Study Abroad Program Application & Approval Form • Submit by annual deadline: October 1 • Include State Dept. advisory level for destination • Provide preliminary budget with cost contingency plan • Include draft itinerary and partner institution information • Ensure Chair and Dean signatures are obtained before submission ■ PACS/Risk: Faculty must confirm student payment method with BAO before advertising program costs.
2	Coordinator reviews submission <i>Coordinator, Office of Global Engagement and Study Abroad</i> Timeline: Within 5 business days of receipt	Check completeness and conduct initial risk screen • Verify all required fields and attachments are present • Check State Dept. advisory level for destination country • Confirm proposed dates, enrollment numbers, and budget • Identify any incomplete sections — return to faculty for revision if needed • Log submission date and initiate review tracking ■ PACS/Risk: Coordinator flags any Level 2, 3, or 4 destinations immediately and initiates appropriate escalation path.
3	Advisory level determination <i>Coordinator + PACS</i>	Determine program risk pathway based on destination advisory level • Level 1 (Exercise Normal Precautions) — standard review pathway continues • Level 2 (Exercise Increased Caution) — enhanced pre-departure briefing required; PACS notified • Level 3 (Reconsider Travel) — written risk mitigation plan required; PACS consultation mandatory; Provost additional review required • Level 4 (Do Not Travel) — program not approved; faculty notified immediately ■ PACS/Risk: PACS must be notified for all Level 2, 3, and 4 destinations. For Level 3, PACS participates in developing the written risk mitigation plan before the proposal advances.
4	PACS insurance coordination <i>PACS / Procurement and Risk Officer</i> Deadline: 4 weeks before departure	Initiate travel insurance binding process • Coordinator submits participant roster to PACS (names, travel dates, passport numbers, emergency contacts) • PACS works with Gallagher to bind insurance policy for all participants • PACS issues insurance confirmation to Coordinator and faculty lead • Faculty lead distributes insurance ID cards and 24/7 assistance number to all participants • Roster must be submitted at least 4 weeks before departure ■ PACS/Risk: No program may proceed without confirmed Gallagher insurance binding. This step is mandatory for all destinations regardless of advisory level.
5	Chair & Dean review <i>Department Chair & College Dean</i> Timeline: Within 10 business days of receiving proposal	Complete departmental rubric review • Review academic quality, learning outcomes, and syllabus • Confirm faculty qualifications and experience for international programs • Review logistics, housing, transportation, and emergency protocols • Assess budget adequacy and cost contingency plan • Sign and return rubric to the Office of Global Engagement and Study Abroad
6	Global Education Committee review <i>Global Education Committee</i>	Scored rubric review and committee recommendation • Review proposal against committee rubric (equity, partnerships, sustainability, risk, institutional alignment) • Consider PACS risk assessment for Level 2 or 3 destinations • Issue recommendation: approve, approve with modifications, or do not recommend • Forward recommendation and full proposal package to Provost's Office ■ PACS/Risk: Committee must confirm that PACS insurance coordination is complete or in progress, and that the program's on-site host contact has confirmed the role in writing (Stage 2, Section 2), before issuing a positive recommendation.

7	Provost final approval <i>Provost's Office</i>	Issue formal institutional approval or denial - Review full proposal package including committee recommendation - For Level 3 destinations: conduct additional review of written risk mitigation plan - Issue formal approval, conditional approval, or denial - Notify Coordinator of decision — Coordinator notifies faculty lead
	Post-approval coordination <i>Coordinator, Office of Global Engagement and Study Abroad</i>	Notify all relevant offices and initiate pre-departure checklist - Notify BAO to create program index - Notify Registrar to create course in system - Confirm PACS insurance binding is complete - Notify ITS for MFA and authentication support for traveling students - Add program to study abroad tracking log and website ■ PACS/Risk: Coordinator confirms with PACS that insurance confirmation has been issued to all participants before pre-departure briefing is held.
	Pre-departure briefing <i>Faculty Program Lead</i>	Faculty leads mandatory student health & safety orientation - Cover emergency protocols, insurance details, local emergency contacts - Distribute emergency contact cards to all participants - Confirm all students have enrolled in U.S. State Dept. STEP program - Confirm all students have valid passports and required visas - Confirm students have arranged any required vaccinations - Notify Coordinator upon safe arrival at destination
	Ongoing monitoring during program <i>Coordinator, Office of Global Engagement and Study Abroad</i>	Monitor advisory levels and maintain contact with faculty lead - Check State Dept. and CDC advisories for destination throughout program duration - Maintain contact with faculty lead — check in at agreed intervals - Escalate to Provost's Office immediately if advisory level increases to Level 3 or 4 - Coordinate emergency response if needed per Health & Safety Policy Section 7 ■ PACS/Risk: If a Level 3 or 4 advisory is issued during an active program, Coordinator notifies PACS immediately to assess insurance implications and evacuation options.

PACS Escalation Summary

The following table summarizes when PACS must be formally engaged in the review process:

Advisory Level	PACS Engagement	Timing
Level 1	Standard insurance binding only	Roster submitted at least 4 weeks before departure
Level 2	Notification + enhanced insurance review	At Step 3 (advisory determination) and at Step 4 (insurance binding)
Level 3	Mandatory consultation — written risk mitigation plan co-developed with PACS	At Step 3 (before proposal advances to committee); again, at Step 4 for insurance
Level 4	Program not approved — PACS notified for records	At Step 3 — program halted; no further steps
During active program	Immediate notification if advisory level increases during program	At Step 10 — Coordinator notifies PACS within same business day

Related Documents

- Study Abroad Program Application & Approval Form (Starting Summer 2027)
- OIT Health & Safety Policy for International Travel
- Revised International Travel Request Form
- OIT Travel Standard Operating Procedure (SOP) (in development)

Questions about this workflow should be directed to the Coordinator, Office of Global Engagement and Study Abroad (global.engagement@oit.edu) or the PACS Procurement and Risk Officer.