OREGON INSTITUTE OF TECHNOLOGY
Study Abroad Program Planning & Approval Form

Stage 2: Program Planning & Approval

Office of Global Engagement and Study Abroad

Annual Submission Deadline: October 1 | Submit to: global.engagement@oit.edu

Before You Begin

This form is Stage 2 of the study abroad approval process. You should only complete this form after receiving pre-approval (Stage 1) from the Office of Global Engagement and Study Abroad and your department.

Budget figures and logistics at this stage are preliminary estimates. Costs may change during program development. Please describe your contingency plan where applicable.

Required Attachments Checklist

All items marked Required must be submitted with this form. Incomplete submissions will not be forwarded to the Global Education Committee.

☐ Draft syllabus (Required)

☐ Course outline (Required)

☐ Preliminary itinerary — daily/weekly schedule (Required)

☐ Detailed budget worksheet (Required)

☐ Faculty CV with emphasis on international experience (Required)

☐ Partner institution agreement or Memorandum of Understanding (MOU), if applicable

☐ Evidence of prior institutional relationships with partner (if applicable)

Section 1. Program Description

A draft syllabus must be attached. Responses should be substantive (4–8 sentences each).

Academic Rationale:

How does this course fit into academic programs, general education, or institutional/global priorities?

Alignment with Degree / Institutional Goals:

Student Learning Outcomes:

List 3–5 measurable outcomes.

Experiential Components:

Site visits, cultural immersion, service learning, research, internships, etc.

Student Assessment Methods:

Describe how student learning will be assessed during and after the program. If assessment methods are detailed in the attached syllabus, note that here and provide a summary.

Section 2. Location & Partnerships (Detailed)

Visa / Entry Requirements for Students:

Describe visa or entry requirements for the destination country. Confirm that all participating students have been advised of these requirements.

☐ All participating students have been advised of visa/entry requirements ☐ Requirements still being confirmed

Language of Instruction:

☐ English ☐ Other: _____

On-Site Host Contact:

Identify the person at the host institution or organization who will welcome students on arrival, serve as their day-to-day point of contact, and assist in the event of an incident.

Name and Title:	**Institution / Organization:**
Email:	**Office Phone:**
Mobile Phone:	**After-Hours Emergency Number:**
Language(s) Spoken:	**Time Difference from Klamath Falls:**

Has this contact confirmed in writing that they will serve in this role?

☐ Yes — confirmation attached ☐ Not yet — expected confirmation date: _____

Backup On-Site Contact:

Name / Phone: _____ ☐ None identified

On-Site Contact Responsibilities:

Check all that this contact has agreed to provide:

☐ Welcome and orientation on arrival

☐ Day-to-day point of contact for students during the program

☐ Liaison between the faculty lead and the host institution

☐ Assistance in a medical, safety, or security incident

☐ Other: _____

Section 3. Logistics & Risk Management

Provide detailed, specific information for each category. All plans are preliminary estimates at this stage and may be refined during program development.

Housing Arrangements:

Type: ☐ Hotel ☐ Dormitory ☐ Homestay ☐ Other: _____

Confirmed? ☐ Yes ☐ No — expected confirmation date: _____

Describe housing arrangements and any accessibility considerations:

How will accessibility needs be accommodated for students with disabilities?

Transportation Plans:

Include international flights, local transportation, excursions, and airport transfers. Note: All travel bookings must comply with current BAO policy. Please confirm with the Office of Global Engagement and Study Abroad before booking.

Health & Safety Considerations:

Describe known risks, required vaccinations, emergency contacts, and proximity to hospitals or clinics.

Travel Insurance:

Study abroad travel insurance must be Oregon Tech's approved travel insurance purchased through Risk Management.

Travel Insurance Provider:	
Confirmed with Risk Management?	☐ Yes ☐ Not yet

Emergency Protocol Summary (program-specific; the institutional protocol is set in the OIT Health and Safety Policy for International Travel):

Who do students contact first? What is the faculty lead's protocol if a student requires hospitalization?

Faculty Coverage & Supervision Plan:

Please describe the faculty-to-student supervision ratio and your plan if the faculty lead becomes unavailable abroad. For programs with 10+ students, a co-faculty lead or designated backup is strongly recommended.

Faculty-to-Student Ratio: _____

Section 4. Budget Overview

Please complete the table below and attach a detailed budget worksheet. All cost estimates are preliminary at this stage and may be refined during program development.

Budget Category	Included? (Y/N)	Estimated Cost (per student)	Notes / Details
Airfare			
Housing			
Meals			
Excursions / Activities			
Travel Insurance			
Local Transportation			
Visa / Entry Fees			
Other (specify)			
TOTAL (estimated)			

Funding Sources: ☐ Student payments (deposit model) ☐ Department support
☐ Grant funding ☐ OIT Foundation ☐ Other: _____

Faculty Travel Costs:

Please provide estimated faculty travel expenses and identify the funding source. Faculty travel costs should not be included in student program costs.

Estimated Total: _____ Funding Source: _____

Contingency Plan:

If program costs increase after students commit, describe how you will handle the difference.

Student Payment Method:

Please coordinate with BAO and Office of Global Engagement and Study Abroad before selecting a method. Please do not advertise a program cost until payment method is confirmed with BAO. Course fees are not used for study

abroad programs; the student deposit model applies. Describe how student financial aid or scholarships will be applied toward program costs, if applicable: _____

☐ Student Deposit (BAO-managed index) ☐ To be determined — BAO consultation scheduled for: _____

Has BAO confirmed the payment setup for this program?

☐ Yes — confirmed by: _____ Date: _____ ☐ Not yet

Financial Aid / Scholarship Opportunities for Students (if known):

Section 5. Recruitment & Accessibility Plan

Oregon Tech is committed to expanding access to global education, particularly for students from underrepresented or lower-income backgrounds.

Describe your plan to recruit and advertise this program to students:

Please include planned outreach timeline, target departments, and how you will reach students who may not self-identify as 'study abroad types.'

What options will be available to students who face financial barriers to participation (for example scholarships, fundraising, donor support, or payment plans)?

Is this program designed to be repeatable?

☐ Yes ☐ No ☐ Possibly — explain: _____

Section 5B. Student Conduct & Institutional Representation

OIT's Student Code of Conduct applies to all study abroad programs. The following confirms standard institutional expectations.

Student Code of Conduct Acknowledgment:

☐ I confirm that all participating students will be briefed on OIT's Student Code of Conduct before departure

☐ Students will sign a Program Participation Agreement acknowledging conduct expectations (attach if available)

Institutional Representation:

Office of Global Engagement and Study Abroad provides a standard institutional representation briefing for all study abroad participants. If you plan to supplement this with program-specific guidance, please describe below.

Protocol for Conduct Violations During the Program:

Office of Global Engagement and Study Abroad is developing a standard protocol for conduct violations abroad. If your program has unique considerations, please describe them below.

Section 6. Faculty Mentorship & Training

For faculty who are new to leading study abroad programs, OIT encourages a mentorship approach. Where a co-faculty lead or backup supervisor is in place, mentorship can be built into the program structure.

Is this your first time leading a study abroad program?

☐ Yes ☐ No

If yes, do you have a mentor or experienced co-lead identified?

☐ Yes — Name: _____

☐ No — would like the Office of Global Engagement and Study Abroad to help identify one

What training or preparation have you completed or plan to complete?

Department Chair & Dean Review Rubric

Please complete this rubric when reviewing proposals forwarded by the faculty lead and return to the Office of Global Engagement and Study Abroad with signatures.

Academic Quality

Criterion	Meets Standard	Needs Revision	Does Not Meet	Notes
Clear alignment with program/degree requirements or general education	☐	☐	☐	
Well-defined, measurable learning outcomes (3–5)	☐	☐	☐	
Syllabus and course outline attached and complete	☐	☐	☐	

Program Design

Criterion	Meets Standard	Needs Revision	Does Not Meet	Notes
Appropriate duration and structure for short-term study abroad	☐	☐	☐	
Meaningful experiential components described	☐	☐	☐	

Preliminary itinerary attached and feasible	☐	☐	☐	

Logistics & Risk Management

Criterion	Meets Standard	Needs Revision	Does Not Meet	Notes
Adequate housing and transportation plans described	☐	☐	☐	
Health, safety, and emergency protocols addressed	☐	☐	☐	
Faculty lead has relevant international experience or preparation plan	☐	☐	☐	
Travel advisory level noted and appropriate	☐	☐	☐	

Budget & Feasibility

Criterion	Meets Standard	Needs Revision	Does Not Meet	Notes
Budget worksheet attached and costs itemized	☐	☐	☐	
Estimated program cost reasonable and transparent	☐	☐	☐	
Cost contingency plan described	☐	☐	☐	
Funding sources identified	☐	☐	☐	

Overall Recommendation:

☐ Forward to Global Education Committee ☐ Return to Faculty for Revision

Comments / Required Revisions:

Chair/Dean Reviewer Name:	**Date:**
Signature:	**Department / College:**

Global Education Committee Review Rubric

For use by the Global Education Committee after proposals are forwarded by the Provost's Office.

Alignment with Institutional Goals

Criterion	Meets Standard	Needs Revision	Does Not Meet	Notes
Advances Oregon Tech's global engagement mission	☐	☐	☐	
Promotes intercultural competence and global learning	☐	☐	☐	
Broadens opportunities across multiple majors or student populations	☐	☐	☐	

Accessibility & Equity

Criterion	Meets Standard	Needs Revision	Does Not Meet	Notes
Program is affordable and accessible to a broad student population	☐	☐	☐	
Recruitment plan encourages participation from underrepresented groups	☐	☐	☐	
Financial barrier mitigation strategies described	☐	☐	☐	

Partnerships & Sustainability

Criterion	Meets Standard	Needs Revision	Does Not Meet	Notes
Builds or strengthens long-term international partnerships	☐	☐	☐	
Program is financially and logistically sustainable for future years	☐	☐	☐	

Risk Management & Student Support

Criterion	Meets Standard	Needs Revision	Does Not Meet	Notes
Adequate emergency planning, insurance, and health/safety protocols	☐	☐	☐	
Student support strategies for international environments are clear	☐	☐	☐	

Travel advisory level is appropriate; risk reviewed if Level 3+	☐	☐	☐	

Overall Institutional Benefit

Criterion	Meets Standard	Needs Revision	Does Not Meet	Notes
Adds unique opportunities not otherwise available to Oregon Tech students	☐	☐	☐	
Contributes to Oregon Tech's reputation and global visibility	☐	☐	☐	

Committee Recommendation:

☐ Recommend ☐ Recommend with Modifications

Comments / Required Modifications:

Committee Chair Name:	**Date:**
Committee Chair Signature:	

Provost Final Approval

Provost Decision:

☐ Approve ☐ Approve with Modifications

Comments:

Provost Signature:	**Date:**

Administrative Notifications (For Office Use Only)

☐ Business Office notified to create program index

☐ Registrar notified to create course in system

☐ Procurement and Contract Services (PACS) / Procurement and Risk Officer notified to bind travel insurance — student roster submitted

☐ Travel insurance confirmation received

☐ Information Technology Services (ITS) notified of student international travel — multi-factor authentication (MFA) support arranged

☐ Travel cardholder(s) reminded to request U.S. Bank Access Online for monitoring the card abroad (Procurement Card Request ticket)

☐ Faculty notified of approval and next steps

☐ Program recruitment and advertising to students started ☐ Program added to Study Abroad website and tracking log

Processed by:	**Date:**