



GLOBAL MICHIGAN
UNIVERSITY OF MICHIGAN



FROM IDEATION TO IMPLEMENTATION:

GUIDANCE FOR DEVELOPING AN INSTRUCTOR-LED STUDY ABROAD PROGRAM





Introduction

Traveling with a faculty or staff member on a study abroad program may be one of the most impactful and gratifying experiences of a student's academic career at the University of Michigan. This guide outlines key considerations to help you create an instructor-led program that meets your academic or co-curricular learning objectives while providing students with a safe and culturally rich experience. The purpose of this guide is to supplement sponsoring school, college, or unit processes for developing instructor-led programs and to guide program leaders who may be interested in developing new programs or fine-tuning existing programs. The guide covers the lifecycle of program development, including:

- 1. Research and Plan**
- 2. Develop your Program**
- 3. Create your Recruitment Plan**
- 4. Implement Pre-Departure Arrangements**
- 5. Manage the Program On Site**
- 6. Complete Post-Program Follow-up**

At the University of Michigan, there is no central study abroad office. Rather, schools, colleges, or units have an office (or multiple offices) dedicated to supporting education abroad activities, or staff members whose role is dedicated to supporting education abroad activities. Some schools, colleges, or units have defined proposal processes for instructor-led study abroad programs, while others may have more informal processes. Be sure to work with the school, college, or unit that is sponsoring your instructor-led program to outline processes and create timelines for each step.

For the purposes of this guidance, the definition of Program Leader includes any faculty or staff who is assuming some responsibility for a cohort of students on a University of Michigan Related Travel experience abroad. See definition of “Group Travel” in the [International Travel Policy](#) for more details. The school, college, or unit sponsoring the experience may have other names for faculty and staff who are leading programs abroad.

1: Research and Plan

- **Partners:** Consult with the U-M sponsoring school, college, unit, or collaborator that you hope will be the key partner as you develop your program. Program leaders can only run a program if it is supported by the sponsoring school, college, or unit. This could be the unit that is hosting the credits for the experience, or may be the unit that is providing the majority of funding or support. Program leaders must consult with sponsoring units, which may be [International Travel Dean's Designee](#), department leads, or [Education Abroad Units](#) within your school or college as well as potential hosts, coordinators, and institutions/collaborators abroad. Please note that some U-M offices may already have connections in certain locations to recommend to you if you are looking for an on-site coordinator/partner.
- **Preparation Timeline:** Consult with the sponsoring school, college, or unit to establish how far in advance you will need to prepare for this type of experience. Note that each school, college, or unit may have different recommendations, and credit-bearing experiences may need a longer timeline.
- **Purpose:** What are the purpose and learning objectives of the program?
- **Academic Credit:** Will this experience be for credit or not for credit?
 - If the experience is for credit, which school, college, or unit is granting credit? Consult the [Credit Hour Guidance from the Registrar's Office](#).
 - Contact the relevant Education Abroad Unit and/or the [International Travel Dean's Designee](#) to verify support and the process for initiating such a course.
 - Note that students can only receive financial aid for an experience that is credit bearing. Additional restrictions for financial aid eligibility (i.e. a minimum number of credit hours) may also apply depending on the academic term and academic level of participants.
 - If the experience is not for credit, what is your plan for making the experience financially equitable for students to participate? For experiences that are not credit bearing, program leaders must identify the sponsoring school or college.



1: Research and Plan (continued)

- **Eligibility:** Who is eligible for the opportunity, and who is the ideal candidate?
 - Is the program only for students from a certain college or certain major? Are there prerequisite courses? Is it attached to an existing on-campus course?
 - Is it only for students at a certain academic level, e.g. Sophomore, Junior, Senior, Graduate Students?
 - Are students able to travel to the location?
 - Check [U-M Country Risk Ratings](#) for eligibility requirements.
 - Check entry requirements for US citizens while also considering international students.
- **Location:** Where will this study abroad program take place (country, city)? Why is this the best location for this program?
- **Inclusivity:** When designing a program, focus on inclusive program design from the beginning rather than as an afterthought.
 - Host destination considerations
 - Destination-specific needs
 - Attitudes within host country toward various identity groups
 - Build appropriate language and resources for students to make the most informed choice.
 - See [Identities Abroad](#) resources on Global Michigan as well as [Diversity Abroad's Destination Guides](#) for further information.
 - Local legislation regarding
 - Disability
 - LGBTQIA+
 - Discrimination/anti-discrimination
 - Local institutions
 - Accessible resources and infrastructure
 - Culture of student support services
 - Program accessibility
 - Sites (buildings, classroom space)
 - Transportation
 - Housing
 - Available accommodations
 - Dietary
 - Mobility
 - Academic
 - Housing (i.e. gender-inclusive options)



1: Research and Plan (continued)

- Who will be providing on-site support?
 - How many U-M staff or faculty will be leading the group? U-M recommends that at least two people with student support responsibilities are on site whether that is two U-M program leaders, or one U-M program leader with a partnering institution (see below). Consult with your sponsoring school, college, unit to determine requirements.
 - Will you be partnering with another institution in the host country? If so, what is their role? i.e. providing classroom space, housing, curriculum and instruction collaboration, etc.
- How will you incorporate [sustainability](#) into the program?



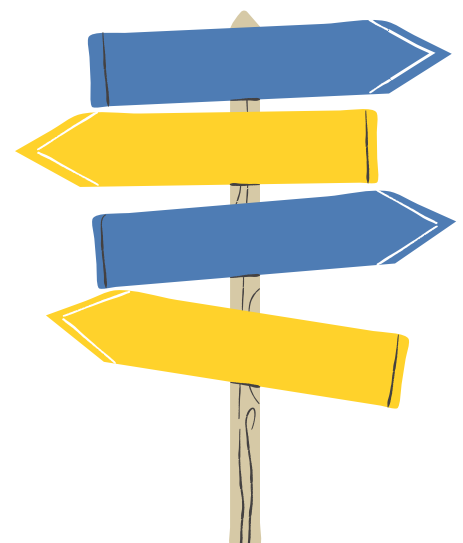
- **Provider:** Will you be utilizing a study abroad provider or collaborator? If so, what is their role? Providers are external or third-party companies that facilitate a range of services for study abroad programming (i.e. logistics, transportation, health and safety, local activities, housing, curriculum support, partnerships with local entities, etc.). Consult the list of [Education Abroad Provider Affiliations](#) already in place at the university level.

- Consult with the sponsoring school, college, unit or the Global Engagement Team to determine the benefits and financial costs of utilizing a provider to develop a customized program for you. Customized program support from a provider covers many aspects of program design and support.

- **On-site Support:** If your program is traveling to multiple destinations, will there be onsite support at each location?

- **Management:** Which parts of the program do you plan to manage on site? i.e., logistics, curriculum and instruction, emergency support, etc. Are there any gaps where additional support is needed?

- **Companions:** Are you familiar with the university's [Guidance Regarding Companions and Dependents](#) for education abroad program leaders and staff members?



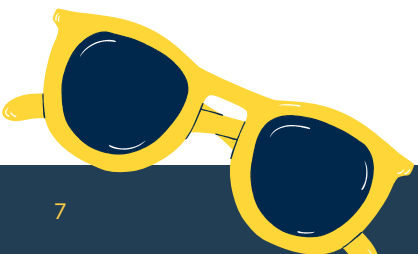
1: Research and Plan (continued)

- **Duration:** What is the optimal duration and term for this trip?
 - Consider schedules of the program leader and any partners as well as student availability.
 - What term and year of study works best for your target students' progress toward degree? Consult academic advisors for guidance.
 - Consider what equity issues could arise from the timing of the trip. For example, shorter experiences may be less expensive, and experiences at the beginning of a semester (e.g. early May) or at the end of a break (e.g. August) may better accommodate working students.
 - If multiple locations are incorporated, consider the travel time required between destinations and weigh the cost/benefit to students.
- **On-campus (component):** Will there be an on-campus component to this program? For example, will the abroad portion of the program be an extension of a class that will be taught on-campus?
- **Budget:** How will I determine the program's budget and student fees?
 - See [Guidance Regarding Education Abroad and Off-Campus Program Fees](#) and [Education Abroad Program Fee Budget Template](#).
- **Funding:** Will students have scholarship options, or will there be funding to offset costs for students?
 - Consider applying for program support from the [New Faculty-Led Education Abroad Program Grants](#) or other university or school/college-based opportunities.
 - Advise students to search for other scholarship opportunities, such as [Funding Opportunities on M-Compass](#).
- **Program Viability:** Have you or should you conduct a [Program Viability Plan](#) for Health, Safety, and Security for this location? Completing the plan is recommended for proposed travel to a [U-M Higher Risk Destination](#).



2: Develop Your Program

- Draft course syllabus:
 - Include course objectives, content, outcomes, and assessment plan.
 - Consider how the course can contribute to [Global Learning Outcomes](#).
 - Articulate the relationship between the host country and the course.
- Draft budget including all anticipated housing, flight, and activity expenses ([Draft Budget](#)). Submit to the sponsoring school, college, or unit for approval, if necessary.
- Confirm program dates and locations (which dates will you be in specific locations).
- Develop your projected itinerary, including travel, classroom time, field work/excursions, and possible guest speakers.
- Compile information describing any collaborating institutions and service providers and whether U-M has a pre-existing agreement with them. Ensure that the appropriate agreements (i.e. MOU, clinical agreements, contracts for vendor goods and services) are in place. Learn more about [Types of Agreements](#) and [Establishing Agreements](#) on Global Michigan.
- Provide an overview of U-M logistics (selection of housing, classroom space, etc.) and onsite support (transportation, excursions, emergency response, etc.) including a description of your role as program leader and any other U-M co-leaders. Which aspects of the program are the responsibility of the U-M program leader or co-leader?
- Provide an overview of external logistics or on-site support, i.e. a third-party provider, tour company, host university or organization. Which aspects of the program are the responsibility of the collaborator?
- Before marketing the program and recruiting students, ensure that you are following the sponsoring school, college, or unit's processes for offering a instructor-led program and complete any approval processes, if any. For questions, consult with department leads, [Education Abroad Units](#) within your school or college, and/or [International Travel Dean's Designee](#).



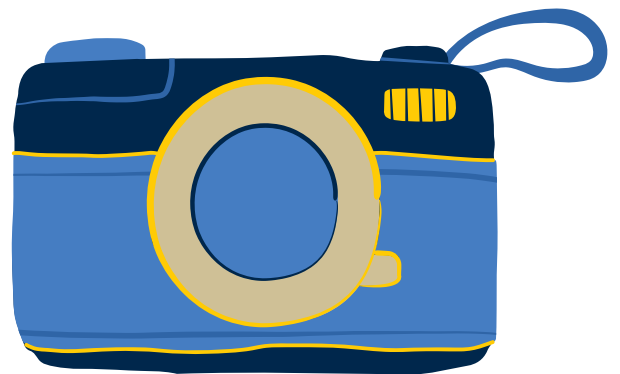
3: Create Your Recruitment Plan

- Based on the eligibility criteria for your program, consider what level of outreach you need to recruit students.
- Develop program application:
 - Consult with your school/college regarding the preferred student application or selection process.
 - Will the application be managed in [M-Compass](#)? If so, the program leader and/or managing unit can work with the Global Engagement Team (GET) to create the application.
 - Using M-Compass as the application management tool has numerous benefits, including:
 - Marketing: Students can search for and learn about the program on M-Compass.
 - Functionality: All application requirements appear in a checklist that students complete.
 - Compliance: Use standard application requirements and signature documents that have been reviewed by GET and the Office of General Counsel.
 - Customization: Units can create program-specific application requirements.
 - Risk Management: Critical University of Michigan risk management structures and processes are integrated into M-Compass including the U-M Travel Registry, prompting students to purchase GeoBlue Travel Abroad Health Insurance (if the unit does not purchase GeoBlue on behalf of students), securely housing important documents such as passport copies, the Safety Plan process, health questionnaires and resources, and the U-M Participation Agreement for International Experiences.
 - If the application is not managed in M-Compass, what mechanism will you use to select students?
 - What will the brochure look like?
 - For example, each program in M-Compass has pages for program overview, application instructions, academics, finances, dates, need-to-know information, and contact information.
 - Photos of the location may also be included for visual interest.



3: Create Your Recruitment Plan (continued)

- Consider posting program expectations that students might need to determine if the program is a good fit for them. Examples: Will the program be physically strenuous, will there be lots of walking, will the students be outside in difficult weather conditions, etc.? Make this clear to students in recruitment materials. Think about asking a question in the application about hiking, rock climbing, tent camping, and other strenuous activities, if included in your itinerary.
- Consider the information you will need from applicants in order to make selection decisions.
- Recruit applicants
 - How do you plan to recruit students?
 - Brochures, email listservs, newsletters, and school/college education abroad offices are great places to start. Outreach could include a brief discussion of the program description, timeline, location, eligibility, photos, and other related information.
 - For programs attached to an on-campus course, are your program details listed in the course description and/or syllabus?
- Select participants
 - What are your selection criteria?
 - A rubric may help maintain an equitable selection process. Consider evaluating competencies rather than experiences (not all applicants have had the same access to experiences or accomplishments).
 - Who will decide?
 - Consider using reviewers who are outside of your school/college/unit.
 - What is your selection timeline? When and how will you notify students?
 - Ensure that your program is prepared to support diverse students. (See [Section 1.](#))



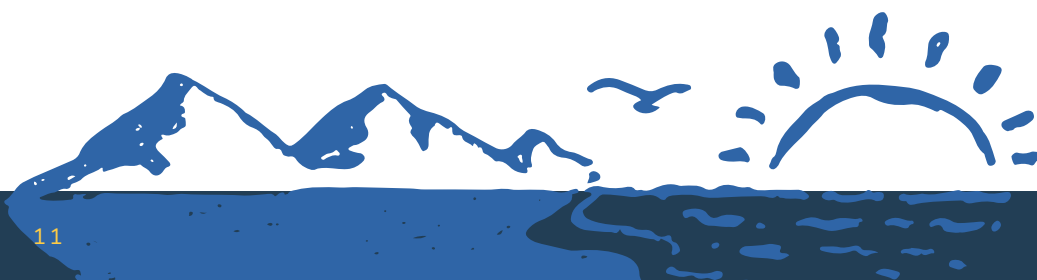
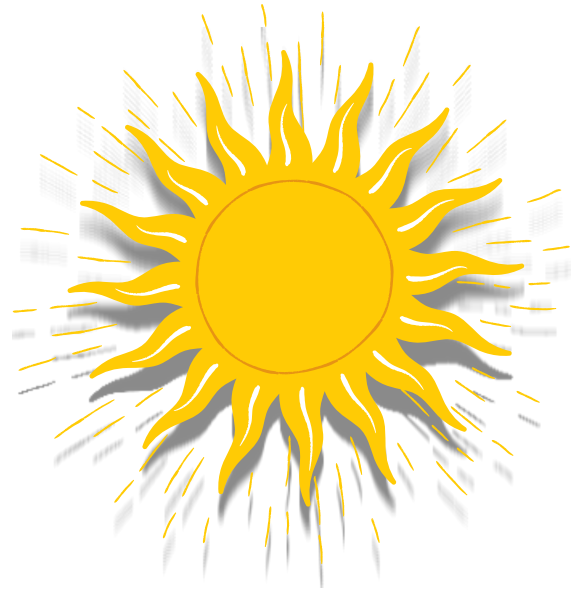
4: Implement Pre-Departure Arrangements

- Finalize program budget and purchasing practices.
 - Work with the sponsoring unit to finalize the program budget.
 - Consult with the sponsoring unit regarding purchasing policies and practices, e.g. using P-Cards or short codes for purchases, reimbursing faculty for expenditures, cash advances, or a combination of these methods depending on the situation.
- For experiences that did not use M-Compass to collect applications, register the student's travel with the U-M Travel Registry by completing the [Group Travel Request Form on Global Michigan](#).
- GeoBlue enrollment / public health requirements:
 - Ensure that all students are enrolled in GeoBlue before travel. Some units enroll the students through the GeoBlue roster enrollment process. Other units provide students with instructions to self-enroll. See the [UHS Travel Abroad Health Insurance](#) page for details.
 - Communicate with students the public health requirements for participating in the program. Requirements may include having vaccinations required for entry, such as a Yellow Fever vaccination.
- Submit [Group Safety Plan](#), if necessary.
 - Contingent on travel risk rating. See your country's risk rating on [Global Michigan](#) for details.
 - See [U-M Travel Health Plan & Safety Plan Process](#) for additional details of the requirement and the review process.
- Finalize flights/transportation plan.
 - Are students responsible for booking their flights? If so, by what date are they expected to arrive? If not, who in your office will book flights?
 - Will there be transportation from the airport to their final destination? If not, what instructions will you provide students so they can travel to the program site? See "[Travel Tips - Packing List and Arrival Plan](#)."



4: Implement Pre-Departure Arrangements (continued)

- Will any transportation need to be booked to take students to activities? If safe and reliable public transportation is unavailable, book your transportation through a reputable company before the trip and/or identify reliable taxi and rideshare services.
- Finalize housing/accommodations.
 - If students will stay on another campus, ensure these rooms are set aside.
 - Book in advance if students are staying in apartments/Airbnb/etc.
 - If your unit is selecting housing, review the “Housing” section of the [U-M Site Assessment Report Template](#) and/or the [Selecting Safe Housing Abroad Guide](#).
 - Ensure that reasonable housing accommodations are met for students with approved housing accommodations. Contact [Services for Students with Disabilities](#) on your campus if a student requests housing accommodations.
 - If students are expected to secure their housing, provide them with safe housing resources (see below) and offer additional guidance such as tips or instructions provided by the on-site partner:
 - Review the U.S. Department of State’s [Lodging Safety website](#).
 - Review the [Selecting Safe Housing Abroad Guide](#).
 - Identify on-site coordinators and after-hours emergency contacts (e.g., Program Assistants, TAs, outside program directors, etc.).
- Attend a U-M program leader workshop managed by the U-M Global Engagement Team (GET). These workshops are typically held in Winter term and announced through the International Education Network.



4: Implement Pre-Departure Arrangements (continued)

- Consult the [Program Leader Resources](#) and the Program Leader Workshops to develop information to share with students during pre-departure orientations, before travel, on-site orientations, and in the event of an emergency.
- Invite students to voluntarily share their accommodations, dietary, medical, and other needs.
- Refer students to support resources as needed. Details are available in the [Program Leader Resources](#).
- Conduct virtual or in-person orientations for student participants. Common topics include:
 - Academics and review of course syllabus
 - Cultural humility and preparation
 - Travel safety and wellbeing
 - Pre-departure logistics
 - Passport requirements
 - Visa requirements, if applicable
 - Any required documents for compliance purposes, such as participation agreements or recording releases
 - On-site logistics
 - Visas / immigration / airport arrival
 - Transportation to and from the airport and during the program
 - Itinerary
 - Housing
 - Food (which meals do students have to pay out of pocket)
 - Funding (how to access money and how much money to bring)
 - Communications / Internet Access
 - What to do and who to call in the event of an emergency?



5: Manage the Program On Site

- Follow your arrival procedure. See “[Travel Tips - Packing List and Arrival Plan](#).”
- Communicate with your U-M administrative contact upon arrival in the host country and maintain regular communication throughout your time abroad.
- Create a group communication plan.
 - Share your cell phone number with your students (i.e. WhatsApp group chat).
 - Collect students' phone numbers.
 - Designate primary and secondary emergency meeting places.
 - Ensure that students know emergency phone numbers, including:
 - The local equivalent of "911"
 - GeoBlue
 - Health and safety information (closest hospital)
 - After-hours number of program leaders or on-site partners who provide emergency support
 - Review program itinerary/discuss local customs.
- Review the [U-M General Emergency Protocols](#) with students.
- Set aside time for reflection with the students as a group. This can be at meals, while on transportation (e.g. bus), or dedicated time for reflection.
- Meet with students on a regular basis one on one to see how they are doing as the program progresses.



6: Complete Post-Program Follow-Up

- Submit all program expenses to school/college/unit.
- Submit grades by the required deadline, if the course is offered for credit.
- Meet with the administrator in your sponsoring school/college/unit to share lessons learned and complete any post-program processes.
- Re-entry reflection:
 - Consider offering your students a post-program meeting to collectively "unpack" their education abroad experience.
 - Explore new skills gained, unexpected experiences, and changes as persons, citizens, and scholars.
 - Discuss how they plan to incorporate their learning abroad into their academic and professional careers.
 - Include an assessment to gather feedback on their program experience and possible improvements for the future.
 - Consult with your school/college for ways that returnees can get involved in continuing to promote education abroad; for example:
 - Enter photos from their experience abroad into the [Global Photo Showcase](#).
 - [Share their experience abroad](#) to be featured on Global Michigan.
 - Participate in study abroad fairs as representatives.
 - Work in an international office as a student ambassador.



Quick Links

UNIVERSITY OF MICHIGAN RESOURCES:

- [INTERNATIONAL TRAVEL POLICY](#)
- [INTERNATIONAL TRAVEL DEAN'S DESIGNEES AT U-M](#)
- [EDUCATION ABROAD UNITS AT U-M](#)
- [CREDIT HOUR GUIDANCE FROM THE REGISTRAR'S OFFICE](#)
- [U-M COUNTRY RISK RATINGS](#)
- [IDENTITIES ABROAD](#)
- [GUIDANCE REGARDING COMPANIONS AND DEPENDENTS](#)
- [EDUCATION ABROAD PROVIDER AFFILIATIONS AT U-M](#)
- [GUIDANCE REGARDING EDUCATION ABROAD AND OFF-CAMPUS PROGRAM FEES](#)
- [EDUCATION ABROAD PROGRAM FEE BUDGET TEMPLATE](#)
- [NEW FACULTY-LED EDUCATION ABROAD PROGRAM GRANTS](#)
- [FUNDING OPPORTUNITIES ON M-COMPASS](#)
- [PROGRAM VIABILITY PLAN](#)
- [INTERNATIONAL AGREEMENTS: TYPES OF AGREEMENTS](#)
- [INTERNATIONAL AGREEMENTS: ESTABLISHING AGREEMENTS](#)
- [M-COMPASS](#)
- [GROUP TRAVEL REQUEST FORM](#)
- [UHS TRAVEL ABROAD HEALTH INSURANCE](#)
- [GROUP SAFETY PLAN](#)
- [U-M TRAVEL HEALTH PLAN & SAFETY PLAN PROCESS](#)
- [TRAVEL TIPS - PACKING LIST AND ARRIVAL PLAN](#)
- [U-M SITE ASSESSMENT REPORT TEMPLATE](#)
- [SELECTING SAFE HOUSING ABROAD GUIDE](#)
- [PROGRAM LEADER RESOURCES GUIDE](#)
- [U-M GENERAL EMERGENCY PROTOCOLS](#)
- [GLOBAL PHOTO SHOWCASE](#)
- [SUSTAINABLE TRAVEL](#)

EXTERNAL RESOURCES:

- [DIVERSITY ABROAD: DESTINATION GUIDES](#)
- [FORUM ON EDUCATION ABROAD: STANDARDS OF GOOD PRACTICE](#)
- [FORUM ON EDUCATION ABROAD: LEADING SHORT-TERM EDUCATION ABROAD PROGRAMS](#)
- [LODGING SAFETY WEBSITE](#)



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GO BLUE!**





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