

This checklist serves as a guide for UTSA Faculty and Staff hosting an international delegation or event. Some tasks may not apply to all visits or events.

Task	Date Completed	Comments
INITIAL PLANNING		
1. Update the calendar upon notification of a tentative visit.		
2. Complete the online delegation request form - Inform leadership and Global Initiatives.		
3. Determine visit date(s), visit purpose and draft outcomes (to include deliverables, signings, etc.) for leadership approval.		
4. Receive Global Initiatives vetting results and guidance and determine level of university involvement; <i>provide courtesy notices to front offices as needed.</i>		
5. Schedule periodic reviews and rehearsals as needed to ensure planning milestones.		
6. Request detailed visitor information for vetting and planning (e.g., bios, food restrictions, etc.).		
7. Ensure Global Initiatives has all visitor names, titles and organizations to request visual compliance check.		
8. Read <i>Enhanced Procedures for International Delegations and Visits</i>		
9. Develop a draft agenda for approval by all proposed participants and leadership.		
10. Create and send a Calendar Invitations to all guest participants including all UTSA participants.		
11. Coordinate and reserve rooms or facilities across campus or off campus as needed (See Toolkit of resources on the VPGI website for ideas). Consult with Global Initiatives as necessary.		

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12. Manage RSVPs: inform Global Initiatives of all additions or changes, as they occur to ensure RSM check; modify all materials (e.g., food, nametag/tent, info folders, gifts, etc.).		
13. Request UTSA and guest participant presentations if applicable.		
14. Prepare documents/folders for international guests (e.g., UTSA quick references, bios, etc.)		
15. University delegations- where is university ranked in Times Higher Education https://www.timeshighereducation.com/world-university-rankings/		
16. For academic institution delegations - research to determine if university shares areas of interest UTSA might wish to pursue.		
LOGISTICS		
17. Flyer/Invitations.		
18. Fill out speaker form.		
19. Create/update presentation(s). If requesting presentations from other offices, send a request with a deadline for inclusion into the overall presentation.		
20. Talking points or info paper for senior leadership if applicable.		
21. Catering or restaurant reservations.		
22. Coordinate on and off campus tours, visits or excursions.		
23. Room set-up (facilities, equipment, supplies, catering, etc.).		

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24. Name tents and nametags. Nametags are required for international guests on campus at all times. They should each be labeled with name, title/organization, and "VISITOR". Name tents should be present for all meetings including UTSA faculty and staff. Label with Prefix, Name, Title and Organization.		
25. Parking Permit. Determine if guests need a parking permit and coordinate with Global Initiatives.		
26. Prepare info for Business Expense Form as you plan and coordinate.		
27. Folders and marketing materials. What take-ways will be in a folder for the guest(s)?		
28. Get gift selection/approval and prepare for presentation (wrapping, labeling, etc.). Try to give gifts that represent San Antonio or Texas. Coordinate with Global Initiatives for an Executive gift presentation by the Provost or President.		
29. Conduct a rehearsal including audio/visual run of show. Include all supplies needed if offering refreshments or a meal in terms of dishes, utensils, cups, beverages, etc. Consider allergies of guests.		
DAY OF THE EVENT		
30. No later than 8:30am (or upon confirmation of arrival on campus), notify the Vice Provost for Global Initiatives and the UTSA President with 1) 5Ws (who, what, when, where, why) of the visit and 2) confirmation that group was vetted by the Research Security Manager.		
31. Technology Setup. This should be done the day before if possible, but ensure audio/visual functionality before guests arrive.		
32. Set up food and beverages if offering refreshments during the initial meeting. Prepare lunch set-up if offering lunch.		
33. Secure support in your team members (meeting participants, escorts, note takers, refreshments, etc.).		

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34. Meet and greet the delegation. Escort the delegation to the initial meeting space.		
35. Take notes for follow up actions		
36. Provide validated parking permits if needed.		
37. Be prepared to transport and escort the visitor(s) to cultural sights or restaurants as planned.		
AFTER THE EVENT		
38. Send follow up information or materials requested at the visit. This includes actions to other departments or offices that came out of the visit.		
39. Financial reconciliations.		
40. Inform Global Initiatives of gifts given and received and any agreed-to items for future collaboration or information sharing.		