



## Study Abroad Faculty Leader Handbook

The Study Abroad Office appreciates your interest in developing a faculty-led study abroad program. We look forward to assisting you in what will be a rewarding opportunity.

Most Purdue University Fort Wayne (PFW) students that study abroad participate in faculty-led programs. For many students, a faculty-led program is their first experience with traveling abroad. The advantage of being “on location” provides many benefits, but also many distractions. Students often see their personal growth and adventures as more important than their academic studies, and as a result, they need to be encouraged to attend all classes consistently and complete all assignments. You might need to remind them that they are not getting credit for *living or traveling* in the country of your study abroad program. In a very direct way, you are helping to train the globally aware leaders of tomorrow by providing life-changing experiences abroad.

Although much work is involved in developing and producing a successful faculty-led study abroad experience, you are not alone in this endeavor; the Study Abroad Office is happy to assist you. We hope you will be able to find the answers to many of your questions in this guide. While this guide is intended to provide a review of the information to consider while proposing and managing a faculty-led study abroad program, it is a work in progress and will continue to be revised and refined with your input. We welcome all additional questions, comments and recommendations.

*Sources used in the completion of this handbook include content from other institutions including Michigan State University and the University of South Alabama.*

*If you have any questions related to the content in this handbook do not hesitate to contact the Study Abroad Office at 1 (260) 481-0322*

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## **Faculty-Led Program Proposal Development**

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Any faculty member considering travelling overseas with a student(s) and/or facilitating student travel overseas (for credit or not for credit) must consult the study Abroad Office to ensure they are following PFW study abroad and risk management policies.

### **Defining Faculty-Led Programs**

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Faculty-led study abroad programs must meet the following criteria:

- taught outside the United States
- involves a full-time PFW faculty member (contract, tenure-track or tenured)
- involves a group of students going to the same location for the same time period
- is supported and approved by PFW

There are two types of faculty-led programs offered at PFW:

- “Stand Alone” programs: credit is granted for participation in the overseas component. Most of these programs generally take place during summer or over other break periods. However, they can last a full semester.
- “Imbedded” programs: these programs offer a short imbedded international experience within a longer main campus course rather than a standalone program. Awarding of credit is NOT tied to participation in the overseas component, but enrollment in the on-campus course is required.

### **Factors to Consider when Developing a Faculty-Led Study Abroad Program Proposal**

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It is important that study abroad program Faculty Leaders understand these responsibilities prior to submitting a program proposal.

#### Participant Eligibility

All programs set minimum GPA requirements for program admission; however, no program is allowed to set a minimum GPA requirement of lower than 2.0. As the Faculty Leader, you can impose any GPA (above minimum) and academic prerequisites that you feel are necessary to serve the purpose of your program. In addition, students on academic or disciplinary probation are not allowed to participate on PFW-sponsored study abroad programs. Individual student exceptions to this policy must be approved by the Director of Study Abroad in consultation with the Associate Vice Chancellor’s Office.

#### Proposal Deadlines

Proposal deadlines have been adopted to ensure all programs allow sufficient time for a review of university risk mitigation and safety and security policies. The study abroad program proposal deadlines below apply to all new and continuing faculty-led study abroad program proposal submissions.

- Summer, Academic Year and Fall program proposal deadline: Completed proposal submitted to Study Abroad Office no later than September 30 of year prior to travel.
- Spring program proposal deadline: completed proposal submitted to Study Abroad Office no later than February 28 of year prior to travel.

- Spring Break proposal deadline: completed proposal submitted to Study Abroad Office no later than May 1 of year prior to travel.

Proposals submitted after the deadline will be considered on a case-by-case basis, and cannot be guaranteed consideration and as proposals take a substantial- period to review.

### Faculty Leader Role

As Faculty Leader, you are responsible for arranging all program logistics, either on your own or through a third-party provider (see below). Aside from tasks associated with instruction, budget management and coordination of program logistics, Faculty Leaders must also follow expectations and procedures regarding the health and safety of students. As a Faculty Leader you will find that your responsibilities do not end in the classroom, students will rely on you for all kinds of extra-curricular assistance as they adjust to a new, and sometimes stressful, environment.

### Working with Third Party Providers

**The Study Abroad Office strongly recommends the use of a third-party provider to help build your program.** Providers are generally non-profit organizations that work with the faculty member to create an international program in a geographic region in which the provider has on-site representation and expertise. This allows the faculty member to focus on the academic components they wish to provide in the overseas program, while allowing the provider to incorporate all logistical components such as accommodation, transport, excursions, tickets, entrance fees and even airfare. In most cases, the provider can also serve as the Program Assistant (see below), thus offsetting some program costs to participants.

While working with a provider does add additional cost to the program, they provide considerable benefits as well. Providers are often able to negotiate lower line-item costs than faculty members may be able to secure on their own. They arrange all logistics for the program (based on faculty member request/need), thus saving considerable time for the faculty member who would otherwise be responsible for all reservations. They allow for easier billing processes, provide on-site risk management support, and provide in-country expertise to assist faculty members.

When working with providers, the Study Abroad Office recommends that the faculty member request, at minimum, two identical proposals from two different providers in order to select a provider that best meets your needs. You are welcome to use the provider of your choice, but the Study Abroad Office can provide the names and contacts of providers with whom PFW has a trusted relationship.

Any provider final proposal/agreement must include all deadlines and payment processing information and must be reviewed and signed by the PFW Purchasing Manager. Faculty and departments administrators cannot sign any legal contracts with a provider. The Study Abroad Office can assist with proposal review and signature.

### Number of Faculty Leaders

For safety reasons, there must always be two adult leaders on the trip. This can be accomplished in three ways.

1. If the proposal requests more than one faculty member to participate in on-site delivery of the onsite course(s), and receive salary/compensation, approval must be received from the sponsoring academic department's Chair noting that faculty compensation may need to be adjusted based on the tuition generated from course registration.
2. Program Assistant through third party Provider. If only one faculty plans to accompany the group, a Program Assistant is required. Your third-party Provider may serve in the role of Program Assistant. Contact the Study Abroad Office to confirm Provider suitability for this role. Any non-PFW Program Assistant (and participant) may be required to provide a criminal background check prior to approval.
3. Program Assistant from PFW. If no in-country partner is available, the Program Assistant must be a PFW faculty, staff, or Graduate student. The Program Assistant cannot be a spouse or dependent of the Faculty Leader, cannot be a participant on the program, and cannot receive academic credit for their role.

In any case, the Program Assistant will take a leadership role in the event the Faculty Leader is incapacitated. The Program Assistant may not be responsible for delivering the remaining academic content, rather they may take a leadership role communicating with the Study Abroad Office and in ensuring student safety (accommodation, etc.) and securing return flights for the students. Compensation for Program Assistants normally consists of airfare, and all program fees. Program Assistants normally do not receive a salary. The Program Assistant's expenses can be built into the program budget. In programs that utilize multiple locations, the Program Assistant must travel with the program. In programs that remain in one location, the Program Assistant may be a capable and willing in-country partner who can be on-call 24/7 to step-in in the event of emergency. Male-female ratio, and objectivity in relation to the lead faculty member, should also be considered when choosing a Program Assistant. Please consult the Director of Study Abroad.

### Coursework

The purpose of a study abroad program is to take advantage of being in a foreign setting rather than on campus. Most Faculty Leaders rely far less on textbooks than you would on the PFW campus. Try to have students seeing and doing, in addition to lecture work. For reading assignments, you may wish to pre-assign textbooks and/or provide materials copied ahead of time, possibly supplemented by available periodicals.

You must provide a syllabus for each course to be offered. The syllabus should contain clarification of contact and preparatory hours and clearly define learning outcomes and assessment methods. Participation is an expectation of all students and should be a very limited component when assessing a student's grade. Your chairperson must authorize specific PFW courses from your college or department that will be offered on your study abroad program. It is not appropriate to simply lead a tour and have the students find their own independent studies. You must teach a course abroad for it to qualify as study abroad.

Each syllabus must articulate:

- Course name and number
- Contact and preparatory hours
- Specific educational objectives of the program
- Assessment mechanisms for each objective
- How the program combines academic learning with cross-cultural experience and is designed to make extensive use of the physical, human, and cultural resources of the host environment

Carefully consider your program curriculum. Students participating in study abroad programs are usually looking to fulfill major/minor/core requirements to justify (to themselves, and their parents) the additional expense. Special topic courses can be offered on faculty-led programs, but fully approved, regular courses are more popular.

If students need to maintain eligibility for maximum financial aid, they must earn a minimum of 6 credit hours during the summer, 12 credits for a semester. Ideally, summer programs should either offer the option of earning 6 credits during the program itself or should be scheduled to fall within one summer session, so that students can take additional courses during the remaining summer session.

#### Excursion Logistics

Excursions are considered part of the academic program and may include walking tours, visits to museums and similar activities. As the Faculty Leader, you will make the logistical arrangements for the excursions and be responsible for preparing the students for the excursion. We recommend you review each excursion and its value with students prior to departure.

If hiring transport for an excursion, be informed about their insurance coverage. Ideally and whenever possible this information should be obtained in advance so that PFW Risk Management Office can review it. Consider hiring transportation or use public transportation instead of attempting to transport students on your own as this minimizes the university's liability as well as your own.

#### Program Itinerary

Ensure there are no U.S. State Department travel warnings for the country(ies) where you intend to go, including transit airports. If your destination is under a travel warning, you will not be allowed to operate.

Prepare a highly detailed itinerary of your study abroad program, bearing in mind that new programs should complement, rather than compete with, existing PFW programs. Copies of this document must be filed prior to departure with the Study Abroad Office and your department chair. Any major changes in itinerary while program is in progress MUST be relayed to the Study Abroad Office while abroad.

Beware of National holidays and the effects on class meetings.

### Salary

Compensation will depend on the number of credit hours s/he is teaching, the faculty member's rank and enrollment thresholds. All questions about salary should be directed to the representative department Chair.

### Accompanying Family Members

Many Faculty Leaders would like to bring family members with them on the program. While this is permitted, please understand the limits and/or conditions on the roles, activities, and presence of accompanying family members. These limits and conditions are based solely on concerns related to health, safety, security, and liability as determined by PFW. The following policies describe the limits and/or conditions that apply to family members accompanying faculty.

- **Employment:** As a general rule, family members of the Faculty Leader may not be hired to perform duties if those duties are under the general supervision/direction of the Faculty Leader.
- **Liability:** Family members and dependent children participating in a program, like students, must sign an Assumption of Risk and Release form. Family members and dependent children are covered by your PFW provided insurance policy.
- **Accommodations:** Faculty Leader family members may share accommodations, provided that such sharing is allowed by the housing provider. The program budget cannot cover additional housing expenses for family members. Under no circumstances should family members share accommodations with students.
- **Excursions/Travel:** Family members may participate in program excursions and field trips, provided such transportation costs do not increase the cost of the excursion, and that the logistics provider allows for family participation. Program excursions are planned to accommodate all students plus the faculty. If there are no extra seats on bus, boat, etc., the program will not arrange for a bigger mode of transportation, therefore increasing the cost. Family members must arrange for their own transportation at their own expense.
- **Excursion Expenses:** If participating in group excursions, family members must pay for their expenses separately from the group. At no time should program funds be used to pay entrance fees for family members.
- **Group Meals:** If participating in group meals, the program director must reimburse the program for any expenses incurred by family members if a separate bill cannot be obtained. Program money cannot be used to buy meals for accompanying family members.
- **Minor Children:** Minor children accompanying program leaders must be adequately supervised at all times. The presence of minor children or other family members should not disrupt or alter the study abroad program in any way.

### **Program Proposal Submission, Proposal Approval, and Recruitment Process Overview**

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All new and continuing program proposals must be submitted to the Study Abroad Office in accordance with the deadlines stated above. If you have any questions or concerns, please contact the Director of Study Abroad.



1. Submit a program proposal via email attachments to the Director of Study Abroad. A complete program proposal contains the following items:
  - Proposal Coversheet
  - Narrative describing the program
  - Preliminary budget worksheet
  - Program itinerary
  - Course syllabus containing contact and preparatory hours, learning outcomes and assessment mechanism(s)
  - Short program description for web promotion
2. The Director of Study Abroad will collate and circulate the proposal for approval from Chairs, Deans, Associate Vice Chancellor for Academic Programs. At each step, there may be additional requests for clarifications/revisions. Only after the proposal has been reviewed and signed by each party is the program cleared to operate. The Director of Study Abroad will notify you at each step and provide approval once all approvals are secured.
3. Once you have received approval for your program proposal from the Study Abroad Office, you should begin student recruitment efforts and work with your college's Business Manager to finalize your program budget. The final budget will determine program cost per student, and that cost cannot be increased once approved. Please be certain to ensure all expenses in the preliminary budget are updated before finalizing the budget. If any expenses change in the budget before finalization, it must be circulated for signature to Chair, Dean, and Associate Vice Chancellor for Academic Programs for "final approval" then submitted to the Study Abroad Office. Students will not be able to apply for your program until the final budget is approved.
4. Once the budget is finalized and / or if there are no requested changes from the preliminary budget, the Study Abroad Office will build the program into the study abroad application portal to allow students to apply.
5. Collaborate with a travel agent/provider to make group flight arrangements (if desired).
6. At least 6 weeks prior to program departure, liaise with the Director of Study Abroad to confirm:
  - The program has sufficient enrollment to run. If there is not sufficient enrollment the program will be cancelled, or cost reductions will have to be determined to cover any program deficit, and a revised budget with the cost reductions or outside revenue source must be included.
  - The program's DOS Travel Warning status is also re-assessed at this time.
  - You will conduct a site-specific pre-departure orientation for your students.
7. Faculty Leaders are responsible for keeping the Study Abroad Office apprised of any changes that take place after the Pre-Departure Orientation and before group departure. Any on-site changes or program concerns should be promptly reported to the Director of Study Abroad.

## **Pre-Departure Preparation**

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*After your proposal has been approved, you can begin recruitment and planning in earnest. Please consider using a third-party program provider for logistical assistance. A third-party provider has the network and expertise to work with you to create the program that best meets your needs. The Study Abroad Office can assist in third party provider selection.*

### **Factors to Consider When Preparing for Program Departure**

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#### **Final Budget**

Upon receiving approval from the Director of Study Abroad, your next step should be to develop the official budget to determine per student cost. **Students cannot complete the application process until you have received an approved final budget along with the approved proposal.** Please contact the sponsoring academic college's Business Manager to finalize your budget. For the most part, expenses should be prepaid as much as possible. It should be noted that certain items (student per diem, contingency funds for medical supplies, spending money, non-group meals, etc.) cannot be included as components of the student program cost. These items can, however, be included in financial aid calculations. The Business Manager can provide guidance on the admissibility of these components.

Your budget will be based on a minimum number of participants. The cost per student will be determined based on these minimum enrollments, and the cost per student cannot be increased after final budget is developed.

If a program has less than minimum enrollment, any financial shortfall will have to come either thru mutually agreed upon revisions to components of the program (i.e., the faculty member, participants, and Director of Study Abroad all must agree on the cost saving revisions such as a reduction in the number of Faculty Leaders, or removal of Faculty Leader expenses) or from external funding sources. Please also note, Faculty Leaders are compensated based on a minimum number of participants. If a program is allowed to move forward with less than the minimum number of participants, the study abroad Office must receive written approval from the Department(s) Chair(s) approving the under-enrolled course, AND Faculty Leader salary may be prorated based on the number of students. If it is determined that the shortfall cannot be made up, the program will be cancelled (determination of enrollment required approximately six weeks prior to departure) and participants will receive a full refund for any deposits paid. Faculty who feel confident that they can recruit a higher number of participants than the prescribed minimum can request the budget be built on an alternate minimum, but again, the students will not pay more than the final cost determined based on the agreed upon minimum number of participants. Likewise, faculty who do not have students absorbing the faculty expenses can develop budgets on a lower minimum number of participants.

When determining the expenses included in your final budget, it should be noted that upon completion of the program, any non-emergency related program deficits must be covered by the

faculty member or their academic department or college. The Study Abroad Office cannot cover program deficits.

**The Faculty Leader should consult with the sponsoring academic college's Business Manager to determine the earliest date of any invoice payment that will result in non-recoverable expenses. The Faculty Leader should notify the Study Abroad Office to set the student program application deadline at a date no later than two business days prior to first invoice payment date to ensure no financial commitment if the program is under-enrolled/cancelled.**

### Contracts

Faculty may not sign any contract involving financial obligation or responsibility, including agreements with travel agents or study abroad providers. Contracts may only be signed by PFW Purchasing Office.

Any outside (whether in US or on-site) contractor, guide, provider, transport company, rental vehicle, driver, and the like must be insured. It is the responsibility of the Faculty Leader to make sure that these companies or individuals are insured.

### Participant Recruitment

Recruiting enough students to make the program viable is of great concern. Experience indicates that enrollment is best achieved through classroom promotion. As such, we encourage you to mention it in all your classes and ask colleagues to give you time to present this opportunity in their classes as well.

### Participant Admission into the Program

You may choose to require any number of application materials for your program, including essays, recommendations letters, etc. This is your choice; however, the requirements must be clearly articulated in your program proposal. There is a standard set of documents and information required to enroll your students and have the Bursar start assessing program fees. Students will submit these documents online directly to the Study Abroad Office through the study abroad application portal. Any additional documents can be submitted to the Faculty Leader directly.

### Student Application Deadlines

All Student applications must be submitted online via the study abroad application portal to ensure the Study Abroad Office is receiving accurate and timely information. Students must submit all documents listed in the study abroad portal by the deadlines set in the study abroad portal for each program. Incomplete applications will be dropped on the deadline dates.

Below are the default student application deadlines:

- Summer program student application deadline. All documents due March 1.
- Academic Year and Fall program student application deadline. All documents are due March 1.
- Spring program student application deadline. All documents due October 1.
- Winter break program student application deadline. All documents due December 1.

- Spring Break program student application deadline. All documents due December 1.

Programs may have earlier deadlines depending on when program invoices need to be paid. Extensions can be granted for programs upon request of the Faculty Leader to the Director of Study Abroad.

### Student Registration

Students must be registered for classes before they leave on the study abroad program. You may need to request that your department's scheduling contact, normally the administrative coordinator, create a special off-campus/international section of the course(s) you will teach abroad.

Keep in mind your salary is based on class registration and therefore, students' tuition revenue. This revenue is factored into the program budget; therefore, registration is critical. Students who are not registered will be ineligible for financial aid and scholarships.

### Students from Other Institutions

Students from other institutions must apply to PFW as a "Guest Student" and pay PFW tuition and fees to participate on a faculty-led program. When a non-PFW student contacts you with interest for the program, please refer them to the Study Abroad Office.

### Flight Arrangements

Group flights are not mandatory; however, it is advisable to work with a travel agent if you include group flights. In the event of a travel disruption the agency can assist with rebooking and provide visa advice.

Please do not make flight arrangements until you have confirmed preliminary approval of your program by the Study Abroad Office and have a very good understanding of the number of participants on your program. Students cannot be required to purchase airfare prior to the application deadline. The Study Abroad Office cannot provide reimbursement for flight expenses if the program is cancelled due to under enrollment.

### Passports and Visas

You are responsible for ensuring you and your participants have the proper passport and visa(s) for your travel. If you do not already have a passport, or it is expired, you should apply for one immediately. (Note: passports must be valid for six months beyond the length of your stay.) The process of obtaining a passport can take four to six weeks, and sometimes longer, so plan and apply in advance. U.S. citizens should visit the U.S. Department of State Passport website (<http://travel.state.gov/passport>) for information about obtaining or renewing a passport.

If your program's host country requires a visa for entry or for stays over a certain number of days, you will need to apply to the consular services of that country. Some countries require entry visas, even for short stays or for transit through one country to the next. The requirements will be country-specific; you can obtain that information from the country's consulate. A list of many embassies is available at (<http://embassy.org/embassies>). Travel Agents may be able to

assist in securing visas for some destinations. Again, as Faculty Leader, you are responsible for ensuring your participants are aware of the need, and process of obtaining, any necessary visa(s) for the program.

A student may not be denied permission to participate on the program based on citizenship. However, it needs to be clear to both student and faculty whether the student will need special documents, and how these are to be obtained.

#### Immunizations

It will be your responsibility to receive and notify participants of any required and recommended vaccinations. You can gather up-to-date information by visiting the CDC website at (<http://wwwnc.cdc.gov/travel/destinations/list.htm>). Please determine your required and recommended vaccinations early as many medicines must be taken 14-28 days before departure, in time for them to be an effective prophylactic at the time of arrival.

#### Medical Insurance and Emergency Assistance

All students and faculty will be enrolled in medical and evacuation insurance. Note, although coverage is the same, students have a different policy number than faculty. Please refer to the correct policy number when utilizing insurance. When medical or mental health assistance is needed, please call the toll free/international collect call phone number on your insurance card for assistance.

All medical costs are the responsibility of the students. Under no circumstances can student or Faculty Leader medical expenses be paid from the program budget or reimbursed by PFW.

#### Insurance Enrollment for Non-PFW Employees

The above mentioned insurance covers all PFW students, employees and dependents. Non-PFW student or employee participants may be required to self-enroll in medical insurance provided by the same policy provider. Contact the study abroad office for information to provide to non-PFW participants on your program.

#### Travel Insurance

Travel insurance is not required. Individuals may opt to purchase travel insurance or other additional insurance depending on specific need. The cost of any travel emergency (for example, food and lodging if flight is delayed) is incurred by the participant. Travel insurance is not a given through any provider or tour agent. Faculty should inquire about insurance and cancellation policies. In the event of illness of a Faculty Leader or student, or in the event of cancellation of a tour, travel insurance is the only way to recover any cost.

#### Arranging Access to Personal Funds Abroad

Please notify your financial institution in advance to ensure your card will be unlocked for use in the countries you will visit.

#### Communications Abroad and Cell Phones

To ensure safety and have a readily available means of communication, the Study Abroad Office mandates that you have a 24/7 phone number available for contact from our office. Cell phones from the US typically will work overseas if you purchase a roaming package from your provider. This cost can be built into the program budget. You are welcome to check with your US provider for specifics. In addition, you can lease or purchase a cell phone or SIM card overseas. This often provides a much lower cost alternative to a roaming package. The cost of your phone Sim Card/Phone and program-related calling expenses should be factored into the program budget. Cell phone numbers should be provided to the Study Abroad Office as soon as they are obtained in country.

### Orientations

Participants should receive, at minimum, two orientations prior to program departure, an Electronic “General” Orientation sent to all students from The Study Abroad Office that covers general information that pertains to all study abroad programs including, health a safety abroad, course registration, insurance, etc., and a Program Specific Orientation provided by the Faculty Leader. The Program Specific Orientation should cover country and program specific information.

As noted above, you should conduct a thorough pre-departure orientation for the students. Your orientation should address such subjects as academics, passport, visa and required travel documents (Note: Your program participants may include both U.S. citizens and non-U.S. citizens. Non-U.S. citizens may be required to apply for visas in cases where U.S. citizens do not need visas for entry into foreign countries and vice versa.), immunizations (if students choose not to comply with requested medical precautions, they will have to sign a liability waiver), travel risks, and emergency contingency plans. Personal safety issues should receive particular attention because customary practices in the U.S. (ex. carrying “Mace” for protection) may be inappropriate or illegal in many countries. Your participation in this session will also provide the opportunity to talk about your expectations for the program and student behavior and disciplinary measures while on the program. In addition to the formal pre-departure meeting, you can host as many informal or preparatory meetings as you wish with the students. Student should also be informed that they can contact the Study Abroad Office at any time before, during or after their program to discuss any concerns they may have about the program content or leadership. Consult with the Study Abroad Office for assistance and/or if you have any questions about preparing your orientation program.

## **Faculty Responsibilities during the Program**

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The chief element of your responsibility is to provide a conceptual view of the program, integrating the academic and experiential sides of the educational experience as fully as possible. The students look to you for academic aspects and cultural stimulus. In addition, budgets and logistical arrangements for excursions are the responsibility of the Faculty Leader. Please note that the Faculty Leader is expected to remain with the students during the entire program.

### **Factors to Consider While On-site with the Students**

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#### Leadership for Students

PFW Faculty Leaders set the tone of the program and can be of invaluable assistance to students trying to cope with unfamiliar surroundings and routines. Since students do not have the same resources as on their home campus and are sometimes homesick or have problems adjusting to their new environment, you can expect to spend time with students outside of classroom environment. Students frequently look for models of behavior, especially while living in an unfamiliar culture. Your goal is to be accessible to students without eliminating all social distances between faculty and students. We encourage you to invite students, in groups, for social gatherings, and to take the lead in arranging other social activities.

The wide range of students' abilities and backgrounds often dictates classes that are rather basic and general in nature. Students with more knowledge can learn by assisting less-informed students to grasp new theories, possibly in a workshop or study group approach. The use of student representatives to act as correspondents with PFW by way of a blog, excursion committees to research and present background information on the field trips, and open houses for group get-togethers have worked well in the past to help develop group cohesion and encourage student involvement.

#### Arrival Checklist

As soon as possible after arrival:

- Provide/Confirm the Study Abroad office with your 24/7 emergency contact number.
- Contact the Study Abroad office by email or phone to inform us of the student's arrival. Worried parents/friends/family members usually call the Study Abroad office first to find out if students have arrived safely. Encourage students to call/email home as well.
- Register the group with the U. S. Embassy using the Smart Traveler Enrollment Program. The web site to do this is (<https://travelregistration.state.gov>)
- If portions of your program have changed, provide the Study Abroad Office with an updated itinerary, and confirm telephone numbers where you can be reached at all study sites visited.

#### On-Site Orientation

You are required to provide students with an on-site orientation upon arrival. Normally this takes place the first full program day. The following is a list of what you will want to make sure is covered during the orientation:

- Emergency response plan and procedure for emergency, incl. meeting place/communication. Discuss potential crisis and create a communication tree so participants can be reached, and can respond, quickly. Designate a primary and secondary meeting space in the event of a crisis
- Remind students they must adhere to local laws, as well as PFW Code of Student Rights and Responsibilities.  
(<https://www.pfw.edu/committees/senate/documents/documents/2015-16/SD89-28.pdf>) .  
Be sure to inform students that they are subject to laws that differ from home. If possible, you might request a local law enforcement officer to assist.
- Remind students you are there to help with any issues (cultural adjustment, grievance complaints for harassment/discrimination, reporting of assault/rape, etc.).
- Provide students with site-specific information about potential health and safety dangers. Examples include, but are not limited to drinking water safety, taxis use, areas of town to avoid, pickpockets, swimming safety/lifeguards, poisonous insects/snakes, watching drinks in nightclubs, gender norms, etc.
- Provide students with in-country emergency contact information: nearest doctor, equivalent of 911, U.S. Embassy/Consulate.

#### Risk Mitigation issues to discuss in on-site orientation

- Make copies of your passport; leave a copy at home with someone you trust and pack an additional copy separate from the original (suitcase, etc.).
- Write down international telephone numbers for credit cards, debit cards, and ATM cards. Write down the account numbers and pack them separate from the originals.
- Confirm that all student accommodation has fire extinguishers and smoke detectors. Be sure to also address fire safety issues with housing and classroom providers before booking.
- Remind students that if they will be traveling on weekends that they are required to leave a copy of their itinerary with you. Also arrange for students to notify you by phone if they change their travel plans and will not be back by the time they had declared. Ensure that they know how to get in touch with you (using local phone systems). Inform them that if they are over 24 hours late without notification, you will try to discover their whereabouts and depending on the circumstances (where the student went, with whom, special circumstances, etc.), you may notify relevant authorities.
- Remind students to exercise care in how much information they give to strangers – be skeptical of new acquaintances.
- Be alert to any danger signs such as the presence of suspicious-looking strangers or unidentified packages.
- Keep abreast of local news through TV, radio, and newspapers.
- In airports, bus terminals and train stations, do not linger at ticket counters; go immediately to departure area after conducting your business.
- Do not borrow suitcases from anyone. Do not agree to monitor or carry any luggage or package.
- Removal all luggage tags or other external items that provide identification (keep ID inside your bags and use an email on the tag vs. a postal address).



- Stay in touch with your family and friends and/or the Study Abroad Office staff so that they know you and the students are safe and where to reach them in case of an emergency.

### Budget Management

Before departure, you should be briefed on budget issues by the Business Manager and will be given a clear understanding of how much is available. It is imperative that you keep accurate records of monies spent. A credit card statement is not considered a sufficient receipt. Keep original itemized receipts for all expenditures and it may help to also keep a spreadsheet with the following categories:

- Food
- Lodging
- Excursions
- Transportation
- Phone/Supplies/Miscellaneous
- Stipend/Guest Lecturers

Keep separate files for anything paid with cash advance funds, out of pocket, or pre-paid. Once you have returned, all expenses must be submitted to the Business Manager so that either the cash advance can be reconciled, or you can be reimbursed for out-of-pocket expenses while on the program. Please note that PFW does not accept foreign currency left over at the end of your program. You are responsible for converting any remaining foreign currency over to U.S. dollars.

### Allowable Expenses:

- Airfare
- Transportation (bus, metro, etc.)
- Parking and tolls for hired transportation
- Lodging
- Group meals
- Group excursion tickets
- Gifting (ex. tips for bus driver)

### Non-Allowable Expenses:

- Alcoholic beverages of any kind are not an allowable expense and will not be reimbursed under any circumstances
- Expenses of any kind for friends or family
- Memorabilia and souvenirs
- Car rental for personal reasons
- Individual student expenses
- Reimbursement to students for lost or stolen items
- Reimbursement for medical payments on student's behalf
- Refunds to students who do not participate in excursions or other program activities

- Personal expenses: this includes clothing, grooming and hygiene items, personal entertainment, or anything else of a personal nature.
- Electronics: electronics are usually large dollar items that once purchased become the property of PFW and are generally not an allowable expense. Inquire in advance if you have a special equipment need you would like to discuss, such as cell or satellite phones.

#### Motor Vehicle Usage on Programs

PFW discourages students from operating motor vehicles abroad but recommends that those students who plan to operate a motor vehicle obtain liability and collision insurance that will cover them in the applicable foreign countries. All motor vehicle travel as an approved component of the program must ensure motor vehicle liability and collision insurance that will cover them in the applicable foreign countries.

Any PFW student or faculty member driving on university business must have a valid license and be approved to drive by Campus Credentials and Transportation. “University business” means those activities that further the mission of the university and, in the case of an employee of the university, are within the scope and authority of that person’s employment. Driving on authorized university business includes operating university owned, leased, or rented vehicles as well as personally owned, leased, or rented vehicles.

Approved drivers must follow all Transportation guidelines while driving on university business and must continuously self-evaluate driving performance to insure it remains in compliance with the university business policies. The policy does not address rules regarding faculty driving students, however faculty routinely drive students to/from field trips and such since students, as a matter of practice are not permitted to drive university vehicles.

## **Faculty Responsibilities after the Program**

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Prior to the end of the overseas component of the program, please take some time to ensure the program concludes in total and all academic and financial issues are resolved.

## **Factors to Consider When the Program Concludes**

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### Post Program Travel

Program completion will take place the day following the last evening of PFW program sponsored accommodation. Students may elect to remain beyond this date; however, they are no longer considered “participants” on a PFW study abroad program and will be responsible for all additional expenses incurred. As Faculty Leader, you may remain longer depending on your program’s needs. Please clarify and confirm this with the Director of Study Abroad prior to program departure to ensure your additional expenses are covered in the budget.

### Grades

You will be responsible for reporting grades for the classes you teach immediately at the end of the semester.

### Expense Reconciliation

Submit all receipts and expense worksheets to the Business Manager immediately upon your return. Generally, the account should be reconciled within 30 days of completion. All original receipts should be taped to 8-1/2” x 11” sheets of paper in chronological order (be careful not to cover any text with tape, as that will cause the ink to disappear, and you might not be reimbursed). Total all receipts to get a total expense amount and submit to the Business Manager. If reimbursement is due to you, please consult with your Business Manager how the funds will be returned.

### Promotion of Future Programs

The Study Abroad Office may ask the alumni faculty to help promote study abroad. We encourage you to participate and talk to all your students about the value of international education. You may be asked to help with future faculty orientations to discuss your experiences.

## **Student Conduct Issues**

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We recognize that the students participating in PFW programs are legal adults and responsible for their own behavior. However, they are also considered representatives of PFW as well as the United States. It is your responsibility to advise the students when they are offending the norms of the host country. Part of the pre-departure and on-site orientation should include discussion of those norms and typical ways in which foreigners may unknowingly violate them.

Students need to be aware that they are subject to the host country laws, to the PFW Code of Student Rights and Responsibilities, from which prohibited behaviors are derived as listed in the Appendix, and to the Study Abroad Office policies and guidelines. The complete text of the code can be found at <https://catalog.pfw.edu/content.php?catoid=62&navoid=3410#code>).

In the case of a serious violation which jeopardizes the safety or well-being of PFW students, faculty, staff, or members of the host culture, students should understand that such behavior may result in dismissal from the program, failure of enrolled courses, loss of program costs, and/or an early return home at the student's expense. You have the authority to remove a student from the program for inappropriate or dangerous behavior.

You should consult with the Study Abroad Office in all cases of student conduct to provide guidance based on university policy and experience. The Study Abroad Office consults regularly the Office of Student Conduct & CARE in such cases to ensure that due process is provided and the proper steps are taken for the safety and well-being of the student, the program staff, and the university. In the case of a program dismissal, it is important to ensure procedures have been followed.

### **Visitors for Students**

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Often student participants will have friends or families visiting during their participation in the program. Those visitors are not allowed to stay with the students. They must find housing on their own. Again, if they join in any program activities, they must pay their own way.

## **Faculty Conduct Issues**

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As Faculty Leader you accept the responsibility of understanding the content of this handbook and abiding by its policies and processes. In addition, just as students must abide by PFW conduct rules, policies, and guidelines while on the program, you and any program staff must adhere to PFW policies as well. Some, but not all, of the possible examples of unacceptable conduct are:

- Reporting to work under the influence of alcohol or illegal drugs, or using alcohol or illegal drugs on the job
- Stealing state property or funds, or knowingly misusing state property
- The willful violation of known or written work rules
- Jeopardizing the safety of persons or property
- Inappropriate relations with students

Failure to abide by any of the policies contained in this handbook, or the PFW conduct rules, may result in cancellation of the program, ineligibility to lead future study abroad programs, and additional disciplinary measures dependent on the nature and severity of the offense.

**Note about alcohol:** Many study abroad programs travel to locations where alcohol is consumed in a more social manner than in the U.S. Regardless, as a PFW employee, you will be held accountable for your actions and the consequences thereof. The consumption of alcohol and/or the results of such consumption are never considered to compromise personal responsibility or accountability. It is important for program staff to keep their own alcohol consumption to a minimum; even during what is considered free time, so that their judgment is never compromised or impaired. Please be aware, as Faculty Leader, you are prohibited from purchasing alcohol for program participants. In social events where alcohol may be served, students of legal age are allowed to purchase alcohol for their personal consumption

**Note about student interaction:** Faculty Leaders and program staff themselves should be careful to avoid any behavior which could be misinterpreted as inappropriate between professor and student. All students and program staff are required to adhere to the PFW policy on the disclosure of consensual relationships: <https://www.pfw.edu/offices/human-resources/Institutional-Equity-and-Title-IX/>

**Note about Harassment including Sexual Harassment or Sexual Violence:** Any reports of harassment, including sexual harassment or sexual violence, should be reported to the Study Abroad Office and Title IX Coordinator immediately. As the Faculty Leader, you will most likely have to initially manage any harassment complaints that happen on-site with guidance from the Study Abroad Office and Title IX Coordinator (if an allegation is made against you, contact the Study Abroad Office and Title IX Coordinator for direction). It is your responsibility to ensure the immediate safety of the student and take corrective action to ensure the student's long-term safety. This may require the dismissal of on-site faculty from PFW contract and/or the dismissal of any offending students from the program. All faculty are required to adhere to PFW

policy on Sexual Harassment: <https://www.pfw.edu/offices/human-resources/Institutional-Equity-and-Title-IX/>

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## **Crisis and Emergency Management**

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Most emergencies witnessed in study abroad are non-life-threatening emergencies such as a minor sickness or injury, theft or loss of belongings, or a family emergency back home. The local authorities, your insurance provider and consultation with the Study Abroad office are your best resources for getting the situation resolved.

In addition, as the Faculty Leader, you may also have to mitigate the effects of “perceived emergencies”, situations abroad which may be perceived in the U.S. as more dangerous than they actually are. Often family/friends at home will become alarmed by a perceived emergency, (for example, floods in Northern Australia, though your program is hundreds of miles away). They can be as disturbing to program participants and their family members as real emergencies and require serious and prompt action on your part. Inform students to contact home and confirm their safety if the event has made international news. Consultation with the U. S. Embassy/Consulate is often advisable and contact with the Study Abroad Office is essential. Faculty Leaders are required to complete an incident report for all medical/psychological/behavioral incidents. The report will serve as the written record of events.

Major emergencies are rare, however when they occur, they often involve a considerable amount of time, resources, and personnel. Although many of these emergencies cannot be prevented, you CAN decide how to prepare and respond.

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### **Emergency Preparation**

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In addition to the steps listed in the on-site orientation section, there are things you must do to facilitate student safety. All Faculty Leaders are required to do the following:

- Know how to access assistance and communicate with local resources during a crisis. These sources include:
  - Know local emergency numbers to call in case of fire/crime/ambulance. Ensure that students also have emergency numbers available to them.
  - Local hospitals, clinics, and health/counseling professionals
  - U. S. Embassy/Consulate
  - Insurance Provider for evacuations and medical translations
- Keep copies of student emergency contact information with you on-site.
- Carry a contingency plan that addresses procedures in case of absence or incapacity of the Faculty Leader.
- Become familiar with the student and faculty health insurance policy. Know the contact numbers for medical assistance.
- Know how to contact the Study Abroad office staff and always carry this information with you.

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### **Decision Making During an Emergency**

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Your initial response to the emergency will help you reach a faster resolution, and there is no replacement for your common sense judgment as first responder. However, the four general steps to be taken during any emergency are:

1. Assessment
2. Securing student(s)
3. Communication
4. Documentation

Assessment – How serious is the emergency? Do you need to administer any first aid immediately? Is this a routine emergency or major emergency? Is one student involved or multiple? Do you need to call an ambulance, police, or embassy? Is the emergency real or perceived? What steps must be taken to secure the environment? The answers to these questions will determine your next step of action.

Securing Students – Secure students and the environment and make sure the students are safe and feel safe. Administer any first aid to the extent possible. Call for any medical/consulate/police help necessary. If there is time, consultation with the Study Abroad Office is strongly recommended. When there is an inability to reach the Study Abroad Office for consultation, the Faculty Leader has the authority to close a program and evacuate the students.

Communication – After the students’ safety is secured, you should contact the Study Abroad Office if possible. After business hours, when it is not possible for you to make multiple calls, it may be best to call Campus Police at 260-481-6827. Their staff has a list of home numbers. Be sure that you have the following information available:

- Name of the caller
- Your local call back phone number
- Location of caller – street, city, and country
- Name(s) of the victim(s) involved
- Details of the accident, injuries, and/or emergency
- Status of the victim(s)
- Location of accident or emergency – how close is it to students and staff?
- Has rescue squad, local law enforcement, U.S. Embassy/Consulate been called? What is their advice?
- Status of all students/staff

#### Additional Important Emergency Communication Information

Please note that under FERPA it is not legal for university employees, including the program’s Faculty Leader, to contact a student’s parent or guardian without permission from the student if the student is over 18. However, schools may disclose education records to parents if a health or safety emergency involves their son or daughter. Check the emergency contact information to confirm whom the student has indicated you should contact.

#### Faculty Leader Communication Responsibilities

Once you have secured all students/staff and contacted the appropriate local medical emergency officials, law enforcement officials, U. S. Embassy/Consulate, and the Study Abroad Office, you

are responsible for maintaining contact with these people, if possible. In political crises or natural disasters, gather as much information as possible from local sources. You MUST maintain contact with the Study Abroad Office to coordinate issues of:

- Group location/activities
- Health and safety
- Legal liability
- Financial concern, particularly in the case of program cancellation or evacuation
- Academic concern, including plans to complete course work after the crisis

### Communicating with the Group

If not all students were involved in the emergency, notify all students of the situation. Lack of information or discussion is likely to create rumors and panic among students. Depending on the nature of the incident and degree of sensitivity, you may wish to hold a group meeting to inform and reassure students, and to quell rumors. Be careful not to appear to be blaming the victim of a distressing incident. Encourage students to call home to assure family members of their safety. However, a panicked telephone call or email message may heighten emotions and impair reason. The principal ingredient in their response will be your response. You must maintain a level head and assume a direct but reasonable manner.

### Assistance with Communications

In the event of the death, disappearance, arrest/detention, or serious medical crisis involving a student participant, one of your first contacts should be the nearest U. S. Embassy or Consulate, American Citizen Service's section. If you are unable to contact the embassy or consulate, you can also contact the American Citizen Services office at the State Department at 1-202-501-4444 (24 hours). Please notify the Study Abroad Office just as soon as possible.

Documentation – If a crisis should occur, keep a written record of all steps taken. The “Study Abroad Office Incident Documentation Form” can be used for any crisis (see Appendix). It is very important for you to document all steps taken after the accident or emergency with a chronological log detailing what happened, steps taken, when they were taken, with whom staff members talked, and what follow up actions were necessary.

### **Legal Difficulties and Record Keeping**

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Whenever there is an incident of any kind which may involve insurance or which has the potential for legal action (accidents, thefts, sexual harassment, etc.) please keep copies of all receipts, relevant paperwork, and carefully documented notes on the event. These notes should include conversations you may have had with the student, local faculty, or staff, or PFW Study Abroad Office, and any actions you may have taken. The dates and times of these events are very important. Please send a copy of your notes to the PFW Study Abroad Office so that we may refer to a written record. Use the Incident Documentation Form (in the Appendix) referenced earlier for your record keeping.

### **Media Communications**

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Do not make any statements to the media before consulting with the Study Abroad Office. PFW will coordinate any media contact for a major crisis.



The first actions taken following an accident, death, or emergency may well determine whether a situation is contained or leads to panic or rumor mongering. All statements to the press should be made exclusively through the appropriate PFW offices. Advise program participants to avoid discussion of the situation until the faculty leader has provided clarification and instructions. Many difficulties may arise when more than one source releases information to the media. The study abroad office will work with University Communications who will in turn release information to the media.

### **Program Cancellation**

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If the University determines that the health and safety of program participants is in jeopardy, it is possible that a program may need to be cancelled. If appropriate and feasible, moving the group to a different site may be an alternative to cancellation. The decision will be made by the Study Abroad Office, in conjunction with the Faculty Leader.

If the cancellation occurs before or soon after the program begins, every effort will be made to refund recoverable costs to the participants. If the emergency occurs toward the middle or end of the program, it may be best to evacuate the group back to the U.S., but to make arrangements to continue the coursework through a form of independent study, rather than cancel the program altogether.

If a program is not cancelled, but an individual student feels uncomfortable about going abroad or remaining on-site, they should be allowed to withdraw. The Study Abroad Office would not be obligated by policy to offer a refund based on this type of student decision, but would, in practice, reimburse any recoverable costs.

PFW is willing to provide assistance when possible, so that students in a crisis will not be unduly penalized either academically or financially. The exact extent of the University's support would be determined by the nature and circumstances of the situation itself.



**INCIDENT DOCUMENTATION FORM**  
Return to Study Abroad Office: [studyabroad@pfw.edu](mailto:studyabroad@pfw.edu)

**MY NAME:**

**DATE:**

**TIME:**

**NAME OF CALLER:**

**CALLER CALL BACK NUMBER:**

**LOCATION OF INCIDENT:**

**WHO IS INVOLVED IN THE INCIDENT:**

**DATE OF INCIDENT:**

**TIME OF INCIDENT:**

**POLICE/EMERGENCY SERVICES NOTIFIED: Y/N**

**DESIGNATED TIME TO FOLLOW UP CALL:**

**DETAILS OF INCIDENT:**