Winona State University

Faculty-Led Programs

a handbook
# Handbook
## WSU Faculty-Led Programs

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Thank you for choosing to commit your time and energy to providing a quality study away experience for Winona State University students. Originally termed “Travel Study” at WSU, these faculty-led courses are central to the WSU global mission. The programs play an integral role in preparing our students to become global citizens, and faculty-led programs hold a valued place among WSU’s off-campus study offerings. For more information on the terms we will use related to off-campus study, see Appendix E.

What defines a faculty-led program is that it:

- is taught off campus for all or most of the duration of the program;
- is led by a WSU faculty member (contract, probational, or tenured)\(^1\);
- involves a group of students going to the same location(s) for the same period of time;
- is specifically designed to capitalize on the experiential learning opportunities unique to an off-campus location;
- provides WSU credit; and
- is administratively supported by WSU.

The first WSU faculty-led program ran in 2004 with 134 students participating in six different programs. Since then, the number of programs offered, and the number of students participating, has doubled. In recent years, faculty-led programs have occurred in countries as diverse as Australia, China, Finland, India, Thailand, Spain, and many others, including the United States. Such courses are designed to make the most of educational opportunities unique to the locations where they are taught, and to integrate classroom instruction and experiential learning activities into a well-conceived whole. These programs enable faculty to reach students in a way that is quite different from an on-campus class.

This faculty handbook is designed to provide you with suggestions, policies, guidelines, and information as you develop and then lead a program. It is a living document, regularly revised and refined with your input and in response to changes in world conditions or state, institutional, or federal policies.

Although much work is involved in developing and teaching a successful faculty-led study away course, you are not alone in this endeavor. The Study Abroad office will be your partner throughout your time as a faculty leader, from initial planning through to your return to campus. Together we enact the mission of Winona State University to be a community of learners improving our world.

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\(^1\) A WSU administrator who has the approval of his/her department chair, College Dean, and the Provost’s office, and has the appropriate academic qualifications, may propose an off-campus course, but faculty proposals will receive priority approval. An instructor or co-instructor who is not a current or retired WSU employee requires Provost Office approval. An instructor or co-instructor who is a WSU retiree may lead an off-campus course with Provost Office approval.
### IMPORTANT CONTACT NUMBERS

<table>
<thead>
<tr>
<th>Name</th>
<th>Contact Details</th>
</tr>
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</table>
| Kathy Jicinsky, Assistant Director of Study Abroad for Faculty-Led Programs | Telephone: 507-457-5019  
Fax: 507-457-5883  
Email: kathy.jicinsky@winona.edu |
| Pattie Thompson, Office Assistant | Telephone: 507-457-5115  
Fax: 507-457-5883  
Email: pathompson@winona.edu |
| Julie Erickson, WSU Travel Director | Telephone: 507-457-2945  
Email: juerickson@winona.edu |
| 24-Hour Emergency Contact Number (WSU Safety and Security) | Telephone: 507-380-3175 |
TIPS FROM PRIOR PROGRAM LEADERS

Off-campus program leaders have identified the following elements that make for the most rewarding and successful program:

1. Don’t just try and duplicate whatever you teach here on campus. Relate your subject matter to the host location.
2. Aim to give students as intercultural an experience as possible. Design activities to get students out of their comfort zone.
3. Be prepared for greater student-faculty contact and interaction than is usually possible on campus. You will be spending more time with these students than you might be used to back on campus. You’ll function as teacher, mentor, advisor, health consultant, travel guide – wearing many hats!
4. Prepare in advance for anything that could go wrong – emergencies, problem cases, student issues. Then, once you arrive, be prepared for the unexpected and always have a plan B. It will never go exactly how you expected.
5. Interview the students to determine their motivation and appropriateness for the program. We didn’t do this, and we learned the hard way. Work on behavior expectations with the class before you depart.

SELECT FACULTY CONTACTS

The following faculty are very experienced at developing and leading off-campus programs. They can be invaluable resources in helping you develop your program concept.

<table>
<thead>
<tr>
<th>Name</th>
<th>Dept.</th>
<th>College</th>
<th>Destination</th>
<th>Contact</th>
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<tbody>
<tr>
<td>Jennifer Biederman</td>
<td>Biology</td>
<td>Science &amp; Engineering</td>
<td>Belize</td>
<td><a href="mailto:jbiederman@winona.edu">jbiederman@winona.edu</a></td>
</tr>
<tr>
<td>Liberty Kohn</td>
<td>English</td>
<td>Liberal Arts</td>
<td>London</td>
<td><a href="mailto:lkohn@winona.edu">lkohn@winona.edu</a></td>
</tr>
<tr>
<td>Jay Palmer</td>
<td>Social Work</td>
<td>Nursing &amp; Health Sciences</td>
<td>Jamaica</td>
<td><a href="mailto:rpalmer@winona.edu">rpalmer@winona.edu</a></td>
</tr>
<tr>
<td>John Nosek</td>
<td>Biology</td>
<td>Science &amp; Engineering</td>
<td>Tanzania</td>
<td><a href="mailto:jnosek@winona.edu">jnosek@winona.edu</a></td>
</tr>
<tr>
<td>Kathy Ready</td>
<td>Business Administration</td>
<td>Business</td>
<td>China</td>
<td><a href="mailto:kready@winona.edu">kready@winona.edu</a></td>
</tr>
<tr>
<td>Susan Zeller</td>
<td>Nursing</td>
<td>Nursing &amp; Health Sciences</td>
<td>Sweden, Finland, Estonia, Iceland, Germany, Paris, England/Ireland</td>
<td><a href="mailto:szeller@winona.edu">szeller@winona.edu</a></td>
</tr>
<tr>
<td>Brian Zeller</td>
<td>HERS</td>
<td>Nursing &amp; Health Sciences</td>
<td>England/Ireland</td>
<td><a href="mailto:bzeller@winona.edu">bzeller@winona.edu</a></td>
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ROLES AND RESPONSIBILITIES

The off-campus faculty leader does indeed wear many hats when leading a program, including professor, safety and health manager, travel guide, budget manager, institutional representative, student advisor, and even activities coordinator. The responsibilities are extensive, requiring skills in leadership, diplomacy, decision making, and interpersonal relations that are different than those needed in the on-campus classroom. But the rewards of off-campus teaching are also numerous. One former leader said it felt like a genuine “living-learning” community, one he hadn’t experienced on campus.

While the faculty leader bears much of the responsibility of conducting the program, the Study Abroad office, your home department and college, the Travel Study Advisory Committee, on-site collaborators, and the WSU Business office all have responsibilities in this process. The following describes each role in detail. There is also a Checklist of Responsibilities which can be found in Appendix A.

THE FACULTY LEADER

- develops the academic content of the course,
- collaborates with Study Abroad to develop program logistics/itinerary, budget, content of promotional materials, an emergency plan, and other components of the program,
- promotes the program and recruits students,
- reviews applications and makes decisions about enrollment,
- assigns any pre-departure assignments and schedules pre-departure orientation meetings,
- makes sure students are aware of and prepared for health/safety concerns of the destination,
- designs guidelines for student behavior during the program with consequences for breach of the behavior expectations,
- assists students in adjusting to cultural differences and group living once on-site,
- manages finances while on the program, including day-to-day monitoring of financial expenditures and collection of receipts, within the guidelines of the approved program budget,
- communicates as needed with Study Abroad regarding any program concerns, and contacts Study Abroad immediately in the case of a specific health or safety issue,
- follows the WSU Crisis Management Plan for off-campus study programs in any cases where the health or safety of program participants has been affected,
- complies with WSU, Minnesota State, U.S. federal, and host government regulations and laws regarding expenditures, travel, and study in the host destination.

THE STUDY ABROAD OFFICE

The Study Abroad office is charged with administration of all off-campus programs domestic and abroad offered to our students for academic credit. In the case of faculty-led programs, Study Abroad serves as the primary liaison between the faculty leader, prospective participants, other campus offices, and on-site contacts in the planning and administration process. Study Abroad has responsibility for the following:

- Offer assistance to the faculty leader in the early design stages of program development by sharing resources and ideas.
• Meet with faculty leader(s) prior to receiving the proposal in order to discuss overall program design.
• Communicate and meet regularly with the faculty leader to discuss and assist with program planning and preparation.
• Create the program budget in collaboration with the faculty leader, continually update it, and provide final budget approval.
• Coordinate with the Travel Study Advisory Committee to review program proposals.
• Oversee the student application process through the on-line enrollment management system Terra Dotta, conduct minimum requirement checks, and track student submission of required application documents.
• Assist the faculty leader with promotion activities, including the creation of promotional material, and administration of the annual study abroad fair.
• Arrange for prepayments and on-site bookings such as accommodations, transportation, tour guides, ticket purchases, etc., in consultation with the faculty leader.
• Handle all monetary transactions, including collection and disbursement of all funds except those payments which must be made while at the program destination.
• Prepare and process faculty leader travel authorization, credit card approval forms, and budget reconciliation on return.
• Conduct post-program reviews.

DEPARTMENT AND COLLEGE

The proposer’s department and College are responsible for approving the proposal. Their signatures must be obtained before the proposal is forwarded to Study Abroad. Department and/or College members may also be invited to assist with program promotion and student recruitment.

TRAVEL STUDY ADVISORY COMMITTEE

The Travel Study Advisory Committee (TSAC) reviews proposals for faculty-led programs and makes approval recommendations. The committee evaluates the course proposal on the specific academic content as it relates to an off-campus course, as well as the logistics of the program. The committee invites proposers of new courses to meet with the committee, and may request additional information about the course during the review process or request revisions prior to approval. Once the TSAC has made a decision about the proposal, the committee’s recommendation is forwarded to the WSU Faculty Association Senate. The Faculty Senate’s recommendation is then forwarded to Meet and Confer. The proposal is then returned to the Assistant Vice President (AVP) of the Center for Global Education, whose signature is required for final approval. Programs with international travel must also obtain approval of the President in order for the program to proceed. Once the course has been approved by TSAC you can only modify its focus, location, staffing, or course level with approval from Study Abroad and consultation with the chair of TSAC. TSAC also works with Study Abroad to develop guidelines and formulate policies for faculty-led programs. The committee typically meets twice a month during the academic year and its members consist of faculty representatives from across campus as well as Study Abroad representatives.
ON-SITE PROGRAM COLLABORATORS

On-site program collaborators may be third-party study abroad providers, travel arrangers, academic institutions, or other third-party vendors such as hotels or guide services. Depending on the structure of a particular program and the needs of the faculty leader, on-site collaborators may help create the program itinerary; arrange housing, classroom space, transportation, and/or excursions; provide on-site cultural and city orientation; lead excursions and field trips; and serve as an on-site contact for non-academic student issues, including emergencies.

WSU BUSINESS OFFICE

The Business Office also has an important role to play in faculty-led programs. This office is responsible for all university travel and financials, and works closely with Study Abroad on these details. Prior to the course departure, faculty leaders will meet with staff from the Business Office and Study Abroad to answer questions and review policies for receipts, tracking expenses, making purchases on-site, etc. If your program requires a Request for Proposal (RPF) process, the Business Office will facilitate this in consultation with Study Abroad staff.
DEVELOPING AN APPROVED PROGRAM

THE PROGRAM PLANNING AND APPROVAL CYCLE

The planning process for a faculty-led program generally begins 18 months to two years prior to departure. At an early stage in the development of a proposal, a potential faculty leader should confer with the department chair to confirm that person’s support for a program proposal, and should meet with the Assistant Director for Faculty-Led Programs regarding the logistical and administrative details of the program. The Assistant Director will assist faculty in developing plans, budget, a recruitment strategy, and handling logistics.

Once the faculty-led course has been approved and you have taught it once, you may resubmit it as a repeat course. A course that has been taught at least three times within a seven-year period will not require the proposer to meet with the TSAC during proposal review. A course that has not been offered during the last four years must be resubmitted as a new proposal. Once the course has been approved by TSAC you can only modify its focus, location, staffing, or course level with approval from Study Abroad and consultation with the chair of TSAC.

Proposal Deadlines

January 15th: for all NEW or REPEAT courses to be offered during the following academic year (Fall, Spring, or Summer)

Proposal deadlines ensure that the process of developing and running faculty-led programs is smooth and clear to all involved. They also allow sufficient time for proposal review by department chairs, College Deans, and others, while ensuring that there is enough lead time for program promotion.

The earlier you start the better. To be most successful, you need at least a full semester to promote the program. Generating student interest as much as a year ahead of time is really ideal. In order to make sure your proposal is submitted on time and give you time for recruiting, it is wise to begin developing your program at least 20 months ahead of when you plan to teach it. For example:

Evaluate the program concept – 18-20 months before travel

- Visit the Study Abroad web page for faculty information and talk with the Assistant Director, as well as your Chair, about what class you want to teach and where you want to go.
- Consider applying for an Exploratory Grant, especially if you have never traveled to the destination where you want to teach. These grants provide up to $2000 to help you develop your course.
- Research locations, making sure it/they are connected with your course content. Why should your course be taught in that location? If the course could just as easily be taught on campus, consider other options. How can you include cultural components specific to the location(s) as part of your course? This is a question the TSAC may ask you.
- Assess whether there is a market for your program. Why will students want to sign up? Who is your target audience?

Develop and plan the program – 12-15 months before travel

- Proposal Deadlines ensure that the process of developing and running faculty-led programs is smooth and clear to all involved. They also allow sufficient time for proposal review by department chairs, College Deans, and others, while ensuring that there is enough lead time for program promotion.

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- Assess whether there is a market for your program. Why will students want to sign up? Who is your target audience?
• Plan what you will teach and how it will connect to the destination of the program. Note - If you are planning an off-campus course that you have not previously taught, decide whether you will use an existing course number (e.g. a Special Topics number, or the number of a current on-campus course which you have redesigned to teach off-campus) or whether you will submit a proposal to Academic Affairs and Curriculum Committee (A2C2) for a new course. The course must be within the scope of the WSU mission and integrated into the curriculum of the University.

• Plan with a Travel Arranger – If you are using one of the travel arrangers approved by Study Abroad and WSU, talk with the Assistant Director about meeting with a representative of that organization so that Study Abroad can request a proposal.

• Meet regularly with the Assistant Director to discuss the logistics, the program budget, the student application process, and other details.

• Decide whether you will include Community Members in your program, and discuss this with the Assistant Director. See the Including Community Members section below for factors to consider.

• Complete and submit the proposal by the deadline via our online system (Terra Dotta) to ensure your program will be considered by TSAC.

Work the program plan – 3-8 months before travel
• Once your program is approved by your Chair, your Dean, and TSAC, you may begin promoting the class and recruiting students. (Note, students cannot apply or make program payments until the course is also approved by Faculty Senate, Meet/Confer, the AVP for Center for Global Education and, if an international course, the President.)

• Review applications and make acceptance decisions.

• Continue to meet regularly with the Assistant Director to finalize logistics and budget details.

• Participate in the faculty pre-departure orientation facilitated by Study Abroad. At least one orientation is held each fall and spring semester.

Prepare students and yourself – 20-90 days before travel
• Work with the Assistant Director to submit your travel request form.

• Conduct pre-departure orientations/gatherings with students on issues of academic expectations, cultural adjustment, travel safety, health, and practical details.

• Submit required faculty leader forms/information via your Terra Dotta account, including medical information, emergency contact information, copy of your passport (if applicable), etc.

• Meet together with staff from the Business Office and the Study Abroad Assistant Director to finalize details of finances, credit card, etc.

• Collect travel packet from the Assistant Director that includes student health information, receipt books and receipt log, and other materials you may need on the ground.

Deliver the program – Teach, travel, and engage the world!
• Conduct an on-site orientation.

• Conduct the program as planned.

• Respond to any emergencies as outlined in the emergency plan (see Appendix B).

• Contact Study Abroad in the case of any emergency, or whenever you want to check in about any matter.
Return to campus: Evaluate and look ahead – within 7-30 days of program conclusion

• Submit all itemized receipts and financial details to the Assistant Director within one week of return.
• Complete a Faculty Narrative Report on the program within two weeks of return.
• Have a post-program meeting/debrief with your students. If possible, ask your class to do a campus presentation about what they learned on the program. Our office will help you advertise it!
• Submit your course grades. You will not receive a copy of the student post-program review coordinated by our office until all student grades are in.
• Consider whether you would like to offer the program again and, if so, consider the deadline to submit a repeat proposal.

PROGRAM DESIGN

LOCATION

Think about where you want to teach your course. How will the location enhance the academic learning that you have in mind? Is the location feasible for leading 10-20 students there? A faculty leader should have some familiarity with the course location. If you have never been there before (or it has been many years), we recommend you take a “familiarization” trip in order to plan your program. If the location is popular, you may find low-cost familiarization trips run by third-party providers. There are also Exploratory Grants available through Study Abroad.

As you’re planning the course, keep in mind the US Department of State Travel Advisory Level of the destination. Faculty-led programs will be accepted only to destinations with a Level 1 or Level 2 Travel Advisory. No faculty-led programs will be accepted or conducted in a destination under a Level 3 or Level 4 Advisory.

Consider the sustainability of the program you are creating. A lot of work goes into developing an off-campus course and the most successful run regularly, not just for one or two years. Think about the effect your visits will have on the host location, as well.

COURSE CONTENT

The first and most important aspect of designing a program is planning what will be taught and linking the course content to the learning opportunities offered at the program destination. The course can have a single focus or can be multidisciplinary. The latter will require greater coordination, but may have a larger market. Like an on-campus course, clear instructional objectives should provide a focus for the program activities.

Students have been known to assume that off-campus courses are a kind of tourism with credit, a fun and entertaining experience that is academically lightweight. However, these courses are credit-bearing academic study, not simply tourism or travel (which is one reason in Study Abroad we never refer to these as a “travel course”). Your course design should have the same academic rigor and high expectations for student work as your on-campus classes. How you design your syllabus will reinforce
that.

PROGRAM DATES AND LENGTH

WSU faculty-led programs run during winter break, spring break, or during summer session, and are typically from one to three weeks. There is no one best time to offer the program, but there are several things to consider:

- What is the best time of year at the proposed destination for the learning you wish to do there? For instance, unless you are studying the effects of winter in the northern hemisphere, you may not want to plan a course to Sweden in December.
- How does the time of year affect the budget for your program? For instance, you may wish to take students to Hawaii to study geological formations in December, but airfare for that destination at that time of year will be higher than if you teach the course in May.
- Weigh the cost and length of travel to the destination against the amount of time you wish to teach the course on-site. For instance, if you hope to teach a course in South Africa over Spring Break, the high cost of airfare, length of travel time, and minimal time on the ground may make the program less financially or academically attractive to students.

RECRUITING

The faculty leader(s) has primary responsibility for student recruitment. The Study Abroad office can assist in brainstorming recruitment strategies and promoting information sessions. Your program will need a certain number of students in order to run, and so you should consider who you will recruit and how. (See more on Class Size next.) Consider these questions:

- Why would a student be interested in joining this program (from a student perspective)? Is there a market for the program you want to create? Are you sure???
- How would the proposed course or program fit with the goals of your department? Will your department colleagues help you promote it to their own students? What other off-campus courses are running concurrently from your department (if any)? What impact might this have on recruitment?
- Are there any faculty members who would be interested in collaborating? Please note: additional staff and faculty will increase the cost of your course, but having a second leader could be very beneficial in planning the course as well as recruitment. Additional leader(s) should have teaching or logistical responsibilities, be able to demonstrate it would be a compelling professional development experience, and/or are slated to be the program’s leader the following year.

CLASS SIZE

As a general rule, the minimum for faculty-led programs is 10 students. Exceptions to this are approved on a case-by-case basis. There are three reasons for a minimum course enrollment. First, from the student’s perspective, smaller group sizes result in wider variations in the program fee as each student then carries a larger share of the program’s fixed costs. The per-student cost difference between 10 students on a program or 9 students may be quite large. This lack of predictability often creates
budgeting difficulties for students. Second, the pricing philosophy of the Study Abroad office is that it is our responsibility – even our duty – to hold down costs when possible without sacrificing too much academic quality or safety assurance. We want these programs to be viable to as many students as possible, not just to those students who could easily afford the experience. Third, our office takes on as much work to coordinate an 8-student program as we would for a 16-student program. With a small staff and many tasks, the Study Abroad office must ensure it is efficient.

You will also be asked to indicate the maximum number of students you are willing to include on the program. This figure will depend on a number of variables, including destination, types of course activities, group dynamics considerations, and your own experience as a faculty leader. If a group becomes too large it minimizes the opportunities to really become immersed in another culture. An ideal class size for most programs is 12-16, but you may have a good reason for wanting to take more students.

CREDITS

Course credit is determined through the standard formula used on campus consistent with each department or College. Most of the program activity that has an academic focus may be considered in determining the amount of credit for the course (e.g. guest lectures, site visits, community-based learning projects, class discussions, museum tours, etc.). These course activities can be counted towards total class contact hours even if they occur in unusual locations such as a group discussion held on a bus heading to or from a site visit.

As you consider how many credit hours you’d like to offer, remember that students pay by the credit, and your faculty salary for the course is also determined by the number of credits. This will affect your budget and the per-student cost for the program.

FACULTY SALARY AND LOAD

The IFO Master Agreement spells out salary and other contract rights for faculty members. All off-campus faculty leaders are compensated for the number of credits they are teaching in accordance with their specific level and step per that fiscal year’s salary schedule. Faculty leaders may not choose to waive their salaries to reduce the overall cost of the program for students but may use PIF funds to offset some costs.

The decision about whether the off-campus course is part of your load is made by the relevant Department Chair(s) and Dean(s). Study Abroad has no involvement in these decisions.

THE SYLLABUS

Differences between off-campus and on-campus teaching may influence how you write your draft syllabus. For instance, instructional activities (e.g. lectures, field trips, papers, journals and presentations) may be affected (or influenced) by the destination. For example, if students are tired, they may not be able to concentrate very well. You should select activities that take advantage of the site. If you have a multi-site course, keep in mind the effects of travel in terms of time and body fatigue. You may also want to coordinate activities, such as specific reading or writing assignments, to get the
most out of particular places.

The location may also impact your assessment measures (e.g., concentrating on a written exam on the road can be difficult.) You also might want to develop more thoroughly what would be considered an “A in participation” since participation may look different in an off-campus course than in a WSU on-campus classroom.

Your syllabus or course schedule should include pre-departure activities that will give students knowledge about the subject and location so that they can be prepared. Make sure to discuss any safety concerns or other group dynamics guidelines with the class before departure. If available, the Assistant Director may be able to attend your session at your request. Also plan to have debriefing activities to close the experience upon return. It can be highly beneficial for the student as well as the rest of campus if the debriefing experience can include a presentation of some sort, whether this be a video created, a PowerPoint or Prezi presentation, a poster, or some other visual representation of something learned.
LOGISTICS AND PROGRAM BUDGET

TRANSPORTATION

Program related transportation is divided in two parts: the trip from the U.S. to the destination, and the on-site or local transportation. Regarding the trip from the U.S. to the destination, all travel arrangements are made through the University’s Business Office. Departure and return is usually from/to MSP. Airport transfer may be included as part of your course itinerary and budget, or you can require students to be at MSP at a designated time prior to the flight. Discuss these options with the Assistant Director.

With safety and fairness to all participants as primary goals, students and faculty leaders are expected to travel as a group to the destination, throughout the program, and return together. Exceptions will be approved on a case-by-case basis. If students wish to deviate from the group travel, they must complete a deviation request form that is reviewed by the Assistant Director. If the AD approves the request, it is then submitted as a request to the airline. Note that final decisions about air travel deviations are made by the airline, not by the Study Abroad office. Airlines approve only a limited number of deviation requests for any group flight. If a faculty leader wishes to deviate, they must discuss this with the Assistant Director during the early planning phases of the course. Faculty travel deviations will be reviewed and approved/denied on a case-by-case basis by the AVP of the Center for Global Education.

The options for on-site local transportation will vary greatly depending on the program site. Always utilize local transportation options, as long as these are safe, dependable, and abundant and you have enough familiarity with the site and/or local language to navigate this. If it is necessary for you to have a bus, the University has guidelines about hiring for on-site transportation and the Assistant Director will help you with this.

Students may drive a rental vehicle at domestic destinations with WSU approval, but may not drive a rental vehicle at international destinations. However, you as faculty leader may do so provided the following procedures are followed:

- Study Abroad will check the driving record of any potential drivers and confirm with the Minnesota State system office that these drivers are acceptable to WSU.
- Study Abroad will purchase liability insurance through the rental company. This cost will be included in the program budget.
- Faculty leader(s) who will be driving must be able to verify to the Study Abroad office that they understand the “rules of the road” at the destination. This is usually accomplished by verifying that you have previously lived and driven in the destination, or that you hold an international driving license.
- Twelve passenger vans are the largest vehicles you can rent. Fifteen-passenger vans are prohibited.

LODGING

Lodging is one of the largest expenses of a faculty-led program. The Assistant Director will work with you
to identify safe and affordable options at your destination, including hostels, guest houses, small hotels, etc. Lodging can also be one of the most contentious issues with students. Whatever choice is made, students should be made aware **ahead of time** of what to expect (will they be sharing rooms? how are roommates selected? will bathrooms be shared?, etc.). Study Abroad will book accommodations ahead of time, and will pre-pay whenever possible.

Homestays are a great way to immerse students in the host culture. While they are encouraged, please note that they come with an extra layer of liability. If you are interested in having students experience a homestay during your course, you will work with an approved third-party provider who has expertise in arranging homestays. This ensures that we follow guidelines from the [Forum on Education Abroad Standards of Good Practice](#).

Faculty leaders are expected to reside in the same lodging with the group on-site, but may not share a room with any students.

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**BUDGET DEVELOPMENT**

You will develop your course budget in collaboration with Study Abroad. We know that many WSU students face significant financial challenges, and our goal is to provide outstanding educational opportunities that are affordable. That said, it’s important to remember that cheaper is not always better. Students have definite expectations of baseline arrangements, and neither they nor you should tolerate shoddy or unsafe hotels, inadequate meal opportunities, or missed opportunities for cultural experiences. Experience has shown that we shouldn’t try to offer the cheapest program available. We aim for a responsible and realistic cost for a high quality educational experience.

Faculty-led program fees are all inclusive. Once all the actual program costs are determined, the total amount is divided among the total number of students enrolled in the course. Students and faculty are responsible for their own passport expense.

A program’s cost are based on a number of factors, some of which are under our control and some of which aren’t. Those we can control include:

1. All travel costs for instructor(s) are pro-rated in addition to salary/benefits. Consequently, the more adults there are leading the program, the more expensive it will be for students.
2. Length of the program. Consider reducing the numbers of days off-campus and conduct some of the class on campus either prior to departure or after return.
3. Type of accommodation. Consider utilizing hostels (which are great opportunities for your students to meet other travelers), or lodging that is less centrally located. That being said, however, cheaper is not always better. At the end of a long day of class, site visits, or traveling

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The fee includes:

- airfare (from MSP)
- airport transfers
- onsite transportation
- meals (at least 2/day)
- accommodations
- field trips/excursions
- insurance
- salary and benefits of instructor(s)
- differential tuition based on number of credits
- visa when required
- any other costs unique to your own program
around, you and your students want to come back to a place that is clean and reasonably comfortable. Also, it is sometimes difficult to confirm arrangements and make pre-payments to the very cheapest hotels.

4. Destination. Some locations are simply more expensive than others.
5. Time of year. Just after the December holidays and June-August tend to be more expensive times for travel, depending on location.
6. On-site transportation. Utilize public transportation rather than hired coaches or buses. This also helps students become more savvy travelers when they learn to take public transportation the way the locals do.
7. Cost of excursions or on-site guides. More of these lead to more cost.

Expenses that are beyond our control include:

1. The local currency trends. Sometimes a course is simply more expensive because the dollar is weak against the local currency. The value of the dollar may very well change between the time your course is approved and the time you actually teach it. If the behavior of the currency for your destination has been erratic, a cushion may be built into your course budget to give you some flexibility.
2. Number of students in your course. The higher the number of students, the less each student pays since so many of the program costs are pro-rated. Recruiting is key, but it’s impossible to predict how many students will enroll in a given course.
3. Fuel charges set by airlines. These change based on world economic conditions as well as time of year.
4. Increasing travel costs in general. In most places in the world, inflation increases the cost of everything.
5. In some countries there may be local transportation surcharges for foreigners.

Keep the following in mind as you develop and finalize the budget:

1. List and evaluate as many potential expenditures as possible. The Assistant Director will help you think about expenses that might not have occurred to you (i.e., do you need bottled water for everyone at your destination?).
2. Look for discounts. For instance, is there a day in the week when museums at your destination are free? Are there discounts for college students for some activities on-site? Do some accommodations have a discount for group booking? Or provide breakfast with lodging? This is where the use of a third-party travel arranger can be invaluable since they have access to these kinds of cost savings. The Assistant Director may also be able to help you research these questions, depending on how many faculty-led courses she is managing.
3. Carefully consider the amount of travel you are considering and the number of destinations. The more of these there are, the more expensive the course is likely to be.
4. If your program returns with a negative budget balance for any reason other than serious emergency situations which threaten health or safety, it will have implications for cost centers in your department. Ensure you have the support of your department chair, and that you have been scrupulous in thinking about how to manage your budget both prior to departure and during the program.
5. Refunds will not be issued to students if the program results in a budget surplus after all expenses are reconciled. Any surplus funds are held in an account to cover student tuition.
waivers and build a scholarship source for faculty-led programs.

Program costs do not include cancellation insurance. Students should be encouraged to purchase this on their own if they wish to avoid cancellation penalties (see Student Cancellation Policies, below).

FINANCIAL SUPPORT FOR STUDENTS

Unfortunately, scholarship funding for short-term programs is very difficult to find. (Most scholarships that support study away provide awards only for semester or longer terms.) But that doesn’t mean students have no recourse. You can remind students about these opportunities:

- Financial Aid – A student’s financial aid goes with them on a faculty-led program (with the exception of student employment). This shows the degree to which WSU supports these programs; many institutions do not allow financial aid for short-term study away. Financial aid covers the cost of their tuition and books, just like for any other course. Enrollment in 6 or more credits during the summer term is necessary for a student to be eligible to receive summer financial aid. Other forms of aid may be available to them as well. Refer students to the Financial Aid office to discuss their specific needs.

- Other Resources – Impress upon interested students that if they want to go, they can find a way, even if it means planning ahead of time. They can ask for holiday or birthday presents to support parts of the cost. Some WSU students have crowd sourced funds for their program.2

PROGRAM FUNDRAISING

Some faculty leaders include fundraising as part of the course objectives in order to support an organization or non-profit at the program destination or to help offset the overall program cost. Please note that any funds raised this way cannot be used directly for individual student tuition. However, these funds may be used to reduce total expenses of activities, events, or transportation so that the entire group benefits from a reduced cost in these areas. Appropriate guidelines established by the WSU Foundation for fund raising should be followed.

Note in particular that it is unethical to require student participants to fund raise for the course or to give any grade or points for their participation. Students should never be told the program “might not go” if they don’t raise money or that they must raise a minimum amount. Study Abroad is happy to work with you on designing an appropriate fund-raising campaign for your program. Any donations raised this way must be retained in the WSU Center for Global Education Foundation account and not in the off-campus program’s cost center or a faculty leader’s WSU account or personal account.

WORKING WITH THIRD PARTY PROVIDERS

2 One reading on this is http://www.transitionsabroad.com/listings/study/articles/study-abroad-funding-crowdfunding.shtml.
Travel arrangers and third party providers can be wonderful partners because they are very knowledgeable about the target country, and often have staff who are based there. These organizations possess a wealth of local knowledge, local contacts, and logistical abilities. Contracting for services for faculty-led programs can add academic breadth and depth and improve logistics to ensure a very strong program. These partners also provide a measure of health and safety oversight that can assist a faculty leader. In addition, if a faculty leader becomes temporarily incapacitated or if a student is hospitalized and the group needs to continue on, a third party organization can shoulder the load.

Study Abroad works with the Business Office on the proposal process for travel arrangers and third party providers who are familiar with faculty-led programs in higher education. Use of a travel provider may slightly increase the cost of your program, but the expense is more than worth it since it reduces the amount of time you and Study Abroad staff spend handling the details of your programs. Of course, you may not need a provider at all if you are very familiar with the location you will be taking students to. Discuss this when you meet with the Assistant Director.

If you would like to work with a provider, you should evaluate and decide on the use of providers based on what you want your course to accomplish while abroad. There are different types of providers, ranging from those that prepare all aspects of program logistics, to those that concentrate on housing, guest speakers, teaching space, health and safety planning, travel arranging, tour operators, or local contacts for specific activities.

Study Abroad encourages you to use a third party provider if you have limited experience and few or no contacts in the area. Some providers may even run facilities or programs that can be used by the students (dorms, food, etc.). While providers require a fee, they may save the program by providing accessibility to less expensive options.

If you choose to work with a provider, you must select one who has been approved by the University. These organizations are responsive, can provide in-country support, and have liability insurance required to take on a faculty-led program.

Please note that in some cases, depending on the type or location of the program or other factors relevant to a specific program, the Study Abroad office may require you to use a third party travel arranger.
WRITING AND SUBMITTING A PROPOSAL

PROPOSAL DEVELOPMENT CHECKLIST

The strongest proposals include the following elements:

- A well-defined focus, whether disciplinary or interdisciplinary.
- Pre-requisites that are appropriate to course goals and do not unnecessarily limit the possible recruitment pool of students.
- A clear statement of who the intended audience(s) might be, whether majors, non-majors, or both. The broader the audience, the larger the recruitment pool.
- A clear picture of how course content will be carefully integrated with the course location(s) and how course assignments will fit with on-site living and learning opportunities.
- As comprehensive a summary as possible of all activities associated with the course, including any non-traditional or experiential activities, to enable TSAC to fully understand the proposed design of the course.
- The type and amount of work required of students should be appropriate to the focus and level of the course and compatible with living and traveling conditions. The academic expectations of the course should be comparable to on-campus courses. Typically a faculty-led course has more contact time than on-campus classes because of the intensive nature of off-campus teaching. Contact times include class meetings, lectures by the instructor or guest lecturers, and supervised course-related activities.
- Provide a preliminary daily schedule that outlines in general terms how mornings, afternoon and evenings will be spent. A helpful guide is to schedule at least two of the blocks (i.e. morning, afternoon, or evening) most days for meetings or other group activities to take advantage of the off-campus site, with the third block used for rest or free time.
- Clearly stated assessment measures. Make sure they are realistic and appropriate for an off-campus course (consistent with overall University policies and practices).
- Indicate your preferred course enrollment, but remember the fewer the students, the more expensive the course.
- Make it clear you have given close attention to factors of health and safety at your destination.

PROPOSAL SUBMISSION AND APPROVAL PROCEDURE

Complete the proposal application available through our online system (Terra Dotta). Your department Chair and College dean will complete electronic forms to approve your proposal after it is submitted. Once received by the Study Abroad office, the proposal is routed to the TSAC for review at its next scheduled committee meeting. The TSAC will consider the following in their proposal review:

Academic Goals:

- Does the program have a well-defined disciplinary or interdisciplinary focus?
- Are the program pre-requisites appropriate to program objectives?
- Does the program have articulated Student Learning Outcomes?
• Does the intellectual challenge, program scope, and work required of students correspond to the program course level?
• Is there clear and persuasive academic rationale for this program being taught off-campus at the proposed location(s)?
• Is there evidence of thought given to academic integrity and coherence (integration of readings, lectures, site visits, etc.)?
• Is the type and amount of work required of students compatible with living and traveling conditions?
• Are the means of evaluation clearly stated and appropriate for the program?

Program Itinerary, Daily Schedule, and Logistics

• Is the number of proposed locations reasonable for the pace of travel and appropriate to the program goals and objectives?
• Is there a healthy balance between learning activities and free time?
• Do the logistical arrangements take the language of the program site into consideration?

Integration of Academics, Culture, and Proposed Site(s)

• Are specific examples listed that demonstrate how cross-cultural learning and aspects of culture will be integrated with the on-site experiences and academics?
• Does the faculty demonstrate experience and/or familiarity with the location/country?

Other Program Components

• Does the program seek to recruit a student group this is currently underserved?
• Does the program fulfill a major or General Education Program requirement?
• Is the consideration of health and safety for the proposed location evident?

Overall Contribution to Diversity of Program Offerings

• Does the program contribute to diversity in the faculty-led program offerings for its field(s) of study/academic focus?
• Does the program contribute to diversity in the faculty-led program offerings in its region of the country/world?

TSAC asks proposers of new courses to meet with the committee, and may request additional information about the course during the review process or request revisions prior to approval. Once the TSAC has made a decision about the proposal, the committee’s recommendation is forwarded to the WSU Faculty Association Senate. The Faculty Senate’s recommendation is then forwarded to Meet and Confer. The proposal is then returned to the AVP of the Center for Global Education, whose signature is required for final approval. Programs with international travel must also receive approval of the President, in order for the program to proceed.
VISAS AND PASSPORTS

All participants in an international study away program must have a passport book. Travelers are responsible for ensuring that they have a passport valid for at least six months past the end date of the program.

The majority of the participants in WSU programs will be US citizens, but some may not be. Non-US citizens may have different travel requirements to the program destination. Obtaining visas for non-US citizens can often be a lengthy process and may affect the student’s participation in the program if it is not dealt with in a timely fashion. The Assistant Director will assist you with identifying the visa requirements and make sure the issue is addressed in the development of the program.
PROMOTION AND RECRUITMENT

There is no more effective recruiter than a faculty leader who is excited about his/her program. You represent not only the fundamental value of the program (e.g., academic credit), you are also the guide to new experiences. Students need to have the opportunity to interact with the person who will lead them in this venture.

Successful programs require effective marketing and recruitment using a multitude of approaches. Energy should be focused on the market segment most likely to provide the highest potential. However, information on the off-campus program should be made visible to all those who qualify. All material should represent the program as an academic endeavor supported by the College.

Past faculty leaders suggest the following promotion and recruitment activities:

- Take every opportunity to tell your students about it. The most common answer to how did you learn about this program is “from my professor.” It helps if you teach an existing course that is related to the academic content of the program, or can work with faculty colleagues who teach such a course.
- Make short presentations in classes that teach relevant material. The Assistant Director, or past student participants, can do this as well, but the faculty leader has the most success.
- Ask faculty colleagues to talk about the class or distribute materials.
- Send program information to departmental email lists.
- Place flyers around campus. The Assistant Director will help you work with Creative Services to create your flyer.
- Distribute program information to any related student clubs or organizations.
- Create digital signage for television advertising. The Study Abroad office can assist you with this.
- Provide information to academic advisors in your College or department.
- Attend the Study Abroad Fair to represent your program. In Fall 2017 we had almost 300 students attend.

DISCUSSING PROGRAM COST

Program cost is a deciding factor for many students. Often the first question we get from them is “How much does it cost?” After students learn the program cost, they often make a decision fairly quickly about whether or not they want to apply.

It is important for students to be able to rely on the information they receive. For this reason, we never release program cost estimates until the program budget is semi-finalized. We then determine the program cost range based on the number of minimum/maximum numbers for your program. When we talk about cost information with students, we always present the information on a scale of X to Y, depending on enrollments. We never present cost information as a single, fixed price until 90 days prior to departure. The final program cost is all-inclusive (accommodations, most meals, travel costs, health insurance, admission/event/entry fees, tuition, as well as pro-rated instructor[s] salary, benefits, and travel expenses, etc.).

You are welcome to begin talking to students about your prospective program before you receive final
approval for it. However, you should not provide any specific cost information until the budget is approved and we issue the official cost estimates. If students ask you what the cost will be, always refer them to Study Abroad. Please do not give potential students a “ball park” estimate for the cost of the program. Even if you are an experienced program leader and have taught this course before, it’s likely your estimate will be off base until all budget expenses have been confirmed.

Once you return and financial reconciliation is complete for your program, any remaining funds are retained in a cost center to cover student tuition waivers and build a scholarship source for faculty-led programs. Therefore, never tell students they will get money back after return because they will not. Likewise, if a pre-paid event is cancelled during your program for reasons beyond our control (for example, weather makes it impossible to do the planned scuba-diving activity, or conditions lead your on-site guide to cancel a mountain hike, etc.) students will not receive a refund for a planned activity. We make our financial and cancellation policies as clear to students as possible prior to their final commitment to your program, and we don’t want students to be misled or disappointed.

Always be clear with students about everything that will be included in the program cost and what is not included (typically any additional personal spending they may wish to do), in order for them to make an informed decision. Recruiting may suffer if students assume the listed price is only for tuition with travel costs extra. You can help them understand that the advertised cost range includes everything.

WHO CAN PARTICIPATE

Any eligible WSU student (from first year on up) may apply for a faculty-led program, but not all students can be approved. Since these programs are credit-bearing academic study, students must be in good academic standing. In addition, students who have committed a code of conduct offense and have an open conduct case are not eligible for study away. Finally, the student must be in good financial standing with the Warrior Hub.

PSEO students and students under 18 years of age may not participate in WSU programs. Students who are not U.S. citizens may only study abroad with the prior approval of the Study Abroad office.

If your specific program has additional eligibility requirements, these must be made clear in promotional and application materials. Examples might include a specific course pre-requisite, minimum foreign language skill, class standing, or home department. Remember that additional eligibility requirements will limit your potential number of applicants.
STUDENT APPLICATION AND REVIEW PROCESS

APPLICATION PROCESS

Students apply for your program via our online system Terra Dotta (TD) which is also where you will review their materials once their application is marked as “Ready for Review” by Study Abroad staff.

The study away application process requires students to answer short questions, sign electronically that they have reviewed and understand various policies for study away, and pay a confirmation deposit. The process may also include application documents that you have designed for your specific program and which have been included in the TD system. For instance, you may decide you want each student to submit letters of recommendation, or you may want your students to submit an essay. Talk with the Assistant Director if you have specific application materials.

Once students have applied, Study Abroad screens all applicants for minimum WSU requirements for participation in an off-campus study program. If we are informed that a student has committed a code of conduct offense and has an open conduct case, they are not eligible for study away and we will communicate this to them.

INTERVIEWS

You will receive an email notification that you should review applications on Terra Dotta. In addition to reviewing these applications, we strongly encourage you to interview your student applicants, even if the number of applications is at or below the minimum required for the course. We can’t stress this enough. We recognize that in many cases, you will know the students who are applying because they have taken other classes from you. But your goal is to determine if an applicant is suitable for the course experience and will help you build a strong and coherent group of participants.

The interview is also the opportunity for you to help each applicant understand what they might expect from both the academic component of the course as well as the experiential aspects. For instance, on one recent faculty-led program a student complained to the instructor that she didn’t know they would have to do assignments; she thought they were just traveling! In another case, after being accepted (and not being interviewed ahead of time) a student revealed physical challenges that would make it difficult for him to handle the rigors of some of the program activities. (See information on accommodations, below.) An interview helps you explain your academic expectations as well as any on-site programmatic aspects that are important (e.g., that the group will be walking every day for many miles over rough terrain, or that the housing accommodation will be shared rooms, or that the program includes a service
component that will involve getting dirty, etc.). An interview also helps you (and ultimately Study Abroad) identify students who may not be successful while off campus, or who may need additional support during the program.

**ACCEPTANCE CRITERIA**

As program leader, you may accept, deny, or waitlist an applicant. In deciding whether or not to accept an applicant, you might consider the following criteria (in whatever order matters most to you), especially when application numbers exceed capacity:

- Reason for choosing an off-campus study program (academic as well as non-academic reasons) and motivation for applying.
- GPA
- Personal qualities/Interpersonal skills:
  - Maturity
  - Independence
  - Adaptability
  - Ability to interact well with a group
  - Willingness to initiate cross cultural opportunities
  - Ability to function in stressful situations
- Program specific needs as determined by the faculty leader such as capacity for endurance, or willingness to try unusual foods, etc.
- Generally, all other things being equal:
  - Seniors and juniors should have priority over sophomores and first-year students since this may be their last opportunity to participate in your program.
  - Regularly enrolled WSU students should have priority over non-WSU students (e.g. students who apply from another Minnesota State institution or community members (if you allow this). See [Including Community Members](#) section for more information.

Once you have reviewed applications and informed Study Abroad whether you wish to accept, deny, or waitlist individual students, Study Abroad changes that student’s application status based on your decision (i.e. accepts a student). After a student is accepted, their confirmation deposit is no longer refundable unless the program is cancelled due to low enrollment. The student’s confirmation deposit is applied to their cost for the program. After acceptance, students have a series of additional requirements to complete in their online TD study abroad account (i.e. providing passport information, signing a release and waiver, etc. All program fees are paid directly to the WSU Cashier’s Office. No funds may be collected directly from students by faculty or the Study Abroad office.

**MEETING THE MINIMUM**

Be aware that if you accept 10 students for your program, that does not mean that all these students are definitely participating in the course. Students must make a financial commitment in order for Study Abroad to count them in the course number. If we do not receive confirmations from the minimum number of students that you specified, then we cannot offer the program in its current form and at the price range we announced to students. We also cannot make travel arrangements, program payments,
or contracting. At that point we have two choices: we can work with you to attempt to restructure the program logistics to bring the program costs in line with the funds available, or we can cancel the program.

Programs that fail to receive a minimum number of confirmed students present a difficult problem. We recognize that you and the students are highly invested in seeing the program move forward. If you are interested in trying to lower the program cost to bring it in on budget, we will certainly try to work with you to do that. However, depending on the structure, costs, and the number of confirmed students we must also recognize that it may not be feasible to move forward and we may have to cancel the program. The final decision on course cancellation rests with Study Abroad.
STUDENT FINANCIAL & CANCELLATION POLICIES

As part of the application process students pay a confirmation deposit which is applied to their cost of the course. If you do not accept the student into your course, the confirmation deposit is refunded. Once students have been accepted into your course, their confirmation deposit is no longer refundable unless the course is cancelled due to low enrollment. Application materials explain the student’s financial commitment and the policy for cancellations and refunds. Students are required to review and electronically acknowledge their understanding of this information. Once accepted into the program, students may withdraw from the course up to 90 days prior to departure (though they will lose their deposit). If they withdraw less than 90 days prior to departure, they are responsible for the entire cost of the course and will be billed accordingly regardless of their participation.

Students are billed the full program cost via the Student Accounts office per usual. Students are expected to pay all program costs prior to departure by the deadline established by Study Abroad for each course.

We work hard on the program budget, and the program is advertised with a range of costs based on course minimum/maximum numbers. These are the most accurate estimates possible, but of course costs are subject to change due to a variety of factors including currency exchange rates, fuel surcharges, added airline taxes, and the final number of students enrolled in the program. Students may not cancel their participation due to an adjustment in cost once they have committed. What this means for you is that once your class list is set, you will know 90 days away from departure whether or not you have enough enrollment. If you do, your program will be as financially stable as we can make it.

If a student has a medical issue or some other unusual circumstance within the 90-day period that may prohibit their participation in your program, we will work in good faith to return all recoverable program costs paid by WSU on their behalf. However, it is ultimately up to the specific airlines, on-the-ground accommodations, and other providers whether they will refund any costs. Therefore, we cannot guarantee any reimbursement and for this reason we encourage students and their families to consider travel cancellation insurance. Quote comparisons can be found at insuremytrip.com. Cancellation insurance should be purchased immediately after acceptance into the program for the insurance to be effective, and it’s important to closely review what the chosen insurance policy covers and doesn’t cover.

If a student withdraws from both the faculty-led program and the University, they are responsible for any payments already made on their behalf and they lose their confirmation deposit. On the other hand, if Study Abroad cancels the program before departure (due to unavoidable global events such as epidemic, civil unrest, weather disasters, etc., or due to under enrollment), students may apply their confirmation deposit toward another program, or they may choose to have it refunded.
Students dismissed from a program due to violation of the code of conduct do not receive a refund. Students who have a medical emergency that requires them to leave a program early will not receive a refund of expenses since that student’s program fees have already been paid on their behalf. Thus, we strongly encourage all students to purchase cancellation insurance to help recoup some of the expenses if they have a medical emergency and need to leave the program early.

MEDICAL PREPARATION AND INSURANCE

INSURANCE

All participants in WSU faculty-led programs are covered by WSU’s insurance with HTH Worldwide or STA Travel as part of their program fee. This insurance serves as primary health insurance in the host country and provides medical benefits for injury and sickness. Prescription drugs are covered at 100%. Students or faculty must pay for their medical costs on-site, but return with a receipt which they will submit to the insurance provider for reimbursement. WSU faculty leading a program are covered under the State of MN Risk Management Fund for general liability if they are in compliance with University and State of Minnesota policies.

Some destinations have regulations regarding required inoculations. Information about this can be found at the Centers for Disease Control and Prevention. Students and faculty should consult with their health care provider about inoculations and maintaining their own health; the Study Abroad office will not advise on this matter.

Please be aware that some prescribed U.S. medications may not be legal in some countries (for instance, Adderall, a common U.S. prescription for ADD, may not be brought into Japan). Advice about this can be obtained from Study Abroad for your specific destination.

STUDENT PRE-DEPARTURE HEALTH CONCERNS

Any promotional material for your course should include information about physical skills or capacities which are absolutely required and without which it would be difficult to complete your course. Examples might include: “Students must be able to walk 10 miles a day over difficult terrain” or “Students must be able to endure tropical conditions without air conditioning,” etc. This allows interested students some awareness of what they might be encountering if they participate.

Once students have been accepted, Study Abroad asks them to submit pre-departure health disclosures. Our goal is to ensure that we can help the students manage any ongoing health concerns while they are off campus. In most cases, this means explaining the processes for securing and transporting sufficient amounts of any prescription medications they may need, or helping them understand how to manage food allergies while abroad. We cannot force students to self-disclose but most students understand the request is intended for their wellbeing.

In addition to understanding any medical or mental health concerns that students might have, we also work with them if they have documented learning disabilities. We work closely with Access Services to
DISCUSSING MEDICAL CONDITIONS WITH STUDENTS

The Americans with Disabilities Act (ADA) specifically prohibits discrimination against disabled students. This means that once you have accepted a student into your course, it is illegal to try and drop them from your course because of your concern about their documented mental, physical, or emotional status. Further, the ADA requires that we provide reasonable accommodation to students with documented disabilities in both domestic and international educational programs. In order to comply with the ADA, Study Abroad does not request or require medical information from students before issuing admissions decisions for study away programs.

The law does not define what constitutes reasonable accommodation specifically for off-campus study. However, courts have based their interpretation of “reasonable” in light of the home organization’s scope and budget. With this standard, given the comparatively large budget of a typical state university such as WSU, the university might be expected to provide a broad range of accommodation and support, so it is important that Study Abroad and Access Services be involved in discussions with you and the student at all points.

If a student with a disability expresses interest in your off-campus program, don’t discourage them in applying for the program, even if the required skills/capacities seem like they might be an obstacle for the student. You should never tell a student that they cannot successfully participate in a faculty-led program because of your impression of any physical, medical, psychological conditions or learning disabilities.

If a student initiates a conversation with you about their condition and how it may impact their participation in the program, you are welcome to discuss it with them. However, it would be better if you bring either Study Abroad or Access Services into any formal or informal conversations. If you do discuss the student’s condition without Study Abroad or Access Services present, you should document the discussion as soon as possible thereafter and send your notes to us. When appropriate, we can follow up and involve Access Services as the campus specialists on disability and accommodations. In some cases, it’s helpful to create a Safety Plan that outlines expectations, responsibilities, and consequences. In these circumstances, Study Abroad staff, the faculty leader(s), Access Services, the Dean of Students (if applicable), the student, and sometimes the student’s parents will be involved to create the Safety Plan.

Given the broad increase in mental health concerns, faculty leaders will receive helpful information, advice, and resources from trained mental health experts in their online Terra Dotta accounts.
PRE-DEPARTURE ORIENTATION

Orientation prior to departure plays a critical role in ensuring that students will have a valuable learning experience in your course. This is your opportunity to make your academic and program goals clear to your participants; introduce them to some of the historical or sociocultural aspects of your destination; clarify your expectations for their behavior; and answer their questions. It’s even an opportunity for you to help students understand how to pack effectively, taking less rather than more.

You can find resources on incorporating cultural learning and competence in the Faculty-Led Program Resources OneDrive file. Let us know if you would like access to this file.

Academic expectations should be discussed as part of your orientation, as should behavioral guidelines. You might want to consider having students complete a behavior contract (an example is in Appendix C). You should certainly discuss your expectations for how students will keep themselves safe. These might include such guidelines as:

- Use a buddy system when students go out during their free time, especially at night. The expectation should be that students will watch out for each other.
- Only take clearly marked official taxis.
- Don’t flash expensive jewelry, cameras, or electronic equipment.
- When crossing streets, keep in mind that pedestrians may not be given the right of way. Remember to look both ways! In some countries, traffic comes from the opposite direction from what you expect.
- Stay away from demonstrations or any kind of civil disturbance.
- Protect your passport.
- Do not accept anything from a stranger.

Even if a pre-departure orientation wasn’t considered a best practice in education abroad (Forum on Education Abroad), you would still need to hold one because it is required by Minnesota State Procedure 3.41.1 (amended in 2017). Procedure 3.41.1 also stipulates that you hold at least one on-site orientation within 24 hours of arriving at your destination.

In addition to any other information you wish to convey in your pre-departure orientation, the Procedure stipulates it must include, at a minimum:

a. applicable conduct policies and information on how participants may raise complaints including, but not limited to, sexual harassment or assault;

b. procedures on dealing with alcohol abuse, illegal drug use, and other behavioral incidents,

c. information and associated guidance on health, safety, and security precautions,

d. expectations for immunizations as required by the CDC,

e. review of communications and emergency protocols,

f. appropriate cultural information about the travel destination and adjusting to the environment,

g. completion of all required forms.

Faculty leaders are also expected to inform students about the laws and regulations of the destination country. This information, as well as relevant health and safety information for the specific country, are
available through the Bureau of Consular Affairs, which has country-specific information for every country in the world.

Study Abroad can, at your request, help you design your pre-departure orientation to ensure you are covering all the information that is essential. Documentation of student attendance and verification that the above information was included in the orientation must be provided to the Study Abroad office.

It isn’t only students who must attend a pre-departure orientation. Faculty leaders must also do so annually, as stipulated in Procedure 3.41.1. A faculty orientation will be scheduled each semester and will include information about mandated reporting responsibilities as well as health and safety guidelines, and provide opportunities for faculty leaders to share helpful experiences and teaching practices.
SAFETY AND RISK MANAGEMENT

No institution of higher education can afford to ignore real issues of liability that may arise as we sponsor study away programs. Minnesota Statute 5.41 grew out of a situation a few years ago in which a student died while on study away. Parents of this and other students advocated forcefully for greater transparency regarding the risks of off campus study. Statute 5.41 requires institutions of higher education in the state of Minnesota which sponsor credit-bearing off-campus study programs to, and we quote:

- “report deaths and hospitalizations that occur during program participation including country, primary program host, and program type for each incident;
- verify whether their programs comply with the health and safety standards set by the Forum on Education Abroad or a similar off campus study program standard-setting agency;
- request (though not mandate) incident disclosure from students upon completion of their study abroad program; and
- include a link to OHE’s online report of incident data in any materials provided to prospective off campus study program participants once the report is published.”

In addition to annual reporting in compliance with Minnesota Statute 5.41, Study Abroad also has annual reporting responsibilities under both the national Jeanne Clery Act and Title IX of the U.S. Department of Education.

The Study Abroad office has ultimate responsibility for off-campus study health and safety and will change logistics or make other appropriate decisions for each program depending on the level of risk deemed acceptable for the specific program and/or country. Faculty leaders, the Travel Study Advisory Committee, and appropriate members of the WSU administration will be consulted before a final decision is made.

The safety of faculty and students must be the number one priority.

As a representative of this University, you have significant responsibility to ensure the health and safety of your entire group. In order to avoid any potential for charges of abuse, campus disciplinary action, or even civil or criminal charges, all faculty should demonstrate the highest levels of conduct and responsibility. Potential liability may occur in such cases as, for example, purchasing or providing alcohol for students, sharing a hotel room with a student, or leaving a sick student behind without another adult to ensure the student’s health and safety. WSU, represented by the faculty leader, has legal responsibility during the time period of the credit-bearing off-campus program from official date of group departure to official date of group return.

Further, WSU has a fiduciary responsibility to students: students rely on the faculty, staff, and administration to provide knowledge and services in exchange for their effort (and tuition) to obtain a degree. Most lawsuits in higher education related to study abroad are claims of negligence related to failure of professional duty (see below), or violations of contracts (e.g., in exchange for money and effort, you will receive a credit for this experience). In tort law, a duty of care is a legal obligation

3 https://www.revisor.mn.gov/statutes/?id=5.41
imposed on an individual requiring that they adhere to a standard of “reasonable care” while performing any acts that could foreseeably harm others. The test is the defendant’s actions compared to that of a reasonable person under similar circumstances. In most cases, specialists (such as institutions sponsoring off campus study, and the faculty who represent those institutions) are held to a higher standard of care.

Negligence is defined as the careless performance of a legally required duty or the failure to perform a legally required action. Here are some examples of negligent acts which have been relevant in some legal actions regarding off-campus study:

- Hiring a disreputable transportation provider, allowing them to stick to a schedule or route you know to be unsafe, or not inspecting vehicles.
- Having rules, policies, or procedures that are not followed.
- Failing to conform to standard safety practices for the activity, not just the country (one lawsuit alleged that faculty leaders were negligent in allowing a student to swim in a river in Costa Rica which was avoided by locals because of its rip current).
- Dismissing safety alerts and warnings from reputable sources, without review and documentation.
- Assuming program leaders “know the right thing to do,” and not mandating pre-departure training and orientation for leaders.
- Not requiring international medical insurance.
- Not having someone available 24/7 to contact in case of emergency.
- Practicing medicine without a license.
- Not having a health review process or failing to protect a student’s medical privacy.
- Not having workable emergency and communication plans that faculty leaders and campus staff are familiar with and follow.

It is important to remember that negligence must be proved. But any lawsuit brought against the University or any of its faculty has a chilling effect on our educational mission.4

DISCUSSING SAFETY WITH PARTICIPANTS

Your pre-departure orientation is a crucial time to discuss participant safety while on the program. It’s important to get the tone of this just right. You want participants to understand the seriousness of what you’re discussing, and the importance of having a “what if” plan of action, but you don’t want to cause panic or have participants dwelling on the topic unreasonably. Here are some tips for the kinds of things you should cover:

4 Two recent examples serve as cautionary tales and remind us that we must do the best we can to advise participants of all known or foreseeable risks and dangers. One involves a Hotchkiss School student who developed encephalitis while hiking in a remote, mountainous area of China during a school study abroad program: Court Let Stand $40M Award to Sickened Student. The other involves the death of a UW-Madison student who was robbed and assaulted while abroad shortly after arriving in Rome to attend classes at an international university, John Cabot University: UW Madison Student Study Abroad Lawsuit.
• Remind participants one of the keys in staying safe in a foreign environment is keeping their wits about them to recognize anything that doesn’t feel right, and to make good decisions.

• If participant thinking is clouded by alcohol or drug use, they are at higher risk. Be clear about the alcohol policy, and remind participants that misuse of alcohol may jeopardize not just them, but the entire group.

• Provide information about how participants can contact you on the ground if they are separated from you and need immediate help. Generally any off-campus group includes many participants who take their cell phones with them. Exchange numbers and provide instruction about how to call each other once they’re at an international destination.

• Identify a rally point or safe haven in each location your group will be. If there is an emergency and people are separated, they should know to go to the designated rally point.

• Advise your participants about whether it is safe to contact police authorities at the destination if they need help. In some countries, the local authorities may not be as trustworthy as U.S. participants expect them to be. If you are in doubt about your location, talk to staff in Study Abroad for advice.

• Ask participants to inform you where they are going during their free time. If you need to account for everyone at short notice you at least have an idea where they are and when they’re expected back. Participants understand the need for this information when it is couched in the context of your responsibility to keep them safe on the program, and generally will be cooperative. (If not, the behavioral ground rules for your course could address the issue of participants going off on their own without informing you.)

• Give participants information about the specific cultural context of the destination and how to dress and act appropriately for the context. For example, behavior and dress that are acceptable in major cities are inappropriate in rural areas, or vice versa. Gender norms also vary. In some countries, simple friendliness on the part of a U.S. woman may be interpreted as flirtation to a man from a country where gender roles are more rigid than in the U.S. Likewise, the way a U.S. man interacts with a local woman may be perceived as aggressive when it was only intended to be friendly. In some countries, women are routinely whistled at, pinched, and even grabbed, especially foreign women. In many parts of the world, U.S. women and men are perceived as promiscuous. This may be a stereotype, but it derives from the images that are projected by U.S. movies and media.

Another thing you can tell participants is that Study Abroad registers everyone in your group with the U.S. State Department Smart Traveler Enrollment Program (STEP) prior to departure. The STEP program enables registered travelers to receive alerts and warnings from the U.S. State Dept., enables the U.S. Embassy to contact you if there is an emergency such as natural disaster or civil unrest, and helps your family and friends get in touch with you in an emergency.

ALCOHOL AND DRUGS

Use of alcohol in off-campus programs can be a problem, especially for those students who have suddenly achieved legal drinking age. At the same time, there is a wonderful educational opportunity in helping students understand the cultural differences between use of alcohol in the U.S. and use of alcohol at the program site.

Rule number one: Use of illegal substances is absolutely prohibited. It should be made clear to students that anyone caught using illegal substances will be immediately removed from the program and sent home at their own expense. This means that if alcohol is prohibited by law at the destination (as it is in some parts of India, for instance), then it is an illegal substance for you and your students even if they are of legal drinking age. Familiarize yourself with laws related to alcohol and other drug use at your destination. Country-specific information can be ascertained prior to departure; Study Abroad will assist you with this on request.

Both students and faculty on WSU faculty-led programs must comply with the MnState Board of Trustees Code of Conduct policy and with the MnState Alcohol Policy. MinnState requires that students and faculty must be 21 years of age (the minimum drinking age in Minnesota) in order to be allowed to consume alcohol as part of any program activity at any destination in the world. (If they are of legal drinking age at the destination, they may consume alcohol during their free time if they choose). In other words, if the student is 19 and the legal drinking age at the destination is 18, the student CANNOT drink as part of a program activity (i.e., distillery tour, architectural boat tour of Budapest where a glass of wine is served), but CAN drink during their free time if they want.

Discussions continue among study away professionals and representatives of the MinnState system office to revise the alcohol policy in order to make it more flexible (in most destinations of the world, 18 is the legal drinking age) and also more integrated into the educational outcomes of your program. However, for now you are required to comply with the current alcohol policy and you should be very clear with students about what you expect of them in complying with policies. For example:

- Anyone who provides alcohol to an underage person or is found in possession of illegal drugs will be subject to disciplinary action either before or after return to campus.
- Explicitly discourage students from posing for or posting pictures of themselves or anyone else in the program with alcohol. It may be misconstrued and could trigger disciplinary or other legal actions.
- Do not provide or condone alcohol use in vans, buses, or any other means of transporting students as part of their off-campus program, whether in the U.S. or abroad, including airplanes.
- Expect students of legal drinking age based on the laws of the country of destination to use responsible judgment at all times if they choose to consume alcohol during free time. You may decide to prohibit all alcohol consumption by any student on your program, or portions of the program, or during specific activities. If so, be very specific with students about this, as well as about disciplinary action.
- Remind group members that you expect them to support one another in complying with the code of conduct and alcohol/drug policies. Members who are in recovery or have an alcohol or drug abuse problem should be encouraged to discuss this confidentially with you.
Violations of policies regarding alcohol or illegal drugs, or of additional safety policies that you establish as program leader, can be addressed in one or more of the following ways:

a. Restricted or supervised involvement in subsequent activities during the travel period.

b. Dismissal from the program (the violator will travel home at his/her expense). Underage or illegal use of alcohol or other drugs are grounds for such dismissal.

c. Financial restitution for damaged property.

d. University judicial proceedings upon return to campus.

If you feel you need to send a student home, take the following steps (see Removing a Student from a Program, below).

1. Make sure that due process has been followed. You should be able to prove that the student(s) was informed early in the program of what the conduct rules were and consequences if the rules weren’t followed. Of course you should make sure you have actual evidence that there has been a violation, and that the student(s) has been asked to account for their behavior. (Sometimes there are reasonable explanations.)
2. Contact the Assistant Director to discuss the behavior violation, the steps you’ve taken, and the procedure for sending the student home.
3. A student who is sent home needs to be accompanied to the nearest airport to make sure the student arrives there safely and gets through security. The student will be instructed to continually check in via text, Whatsapp, Viber, etc. with Study Abroad staff so they are aware of the student’s travel status.
4. Whenever possible, the return flight will be rebooked by the travel agency that made the original booking. This will incur a change fee and an adjusted airfare ticket fee that will be charged to the student’s WSU account. If the flight can’t be rebooked by the travel agency or is too challenging to rebook, the flight will be booked using the student’s own credit card, or the faculty leader’s WSU credit card if the student doesn’t have a personal credit card. Any time a student is returning early from a program, you will be in touch with the Assistant Director of Study Abroad for Faculty-led Programs to help facilitate securing the student’s return airfare ticket.

U.S. STATE DEPARTMENT TRAVEL ADVISORIES

Faculty-led programs can only be offered in countries with which the U.S. has official relations and in locations which have a Department of State travel advisory level 1 or 2.

If a travel advisory level 3 or 4 is issued for a destination after students have been accepted but before your group has departed the U.S. and the University decides to cancel the program, all recoverable costs paid by WSU on behalf of students prior to that time will be refunded. Should a travel advisory level 3 or 4 be imposed after you have arrived at your destination, Study Abroad will work closely with you and with contacts on the ground to determine the best course of action to reduce risk.

MANAGING PARTICIPANT/GROUP BEHAVIOR
Hopefully you discussed your conduct guidelines with participants prior to departure. You may even have created a group “contract” that involved discussion by everyone of what behavioral guidelines should be included. But you still might have a behavior issue to deal with while you are on-site.

If there is an issue that is affecting the group as a whole, you will be well served to raise it with the entire group for the good of the whole. There is no need to single out an individual or incident for public recrimination. But do facilitate a general discussion about the group’s expectations for itself and its members. This can include a reminder of previous pre-departure conversations about group norms and behavior and a reminder of group goals. This refocusing on goals can lead the group to decide on any new processes or agreements to help everyone focus. For example, the group might decide that all participants need to be ready in the morning 5 minutes before departure, and that any participants who are not ready at the proper time will be left behind, or they may agree to reinforce the behavior guideline that no participants will leave the hotel on their own without telling someone they are leaving.

Occasionally someone who seemed to be a model student in Winona will develop negative behaviors once they are abroad: regularly be a few minutes late, disrespectful to other members of the group, etc. In these cases, it’s important to talk with the student privately as soon as possible. The student might be having a difficult time with the demands of the program or the travel schedule. They might even be unaware of the impact of their behavior or attitude on others. Even if you are uncomfortable talking to a student one-on-one like this, it’s important that you do it because their negativity will ultimately affect the whole group and the experience will be lessened for everyone. Furthermore, this student’s behavior may have a negative impact on local hosts who may be unwilling to work with WSU, or other American students, in the future. If you need help or advice about how to handle such a conversation, you can always email Study Abroad for advice. We have dealt with these kinds of things before!

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SANCTIONING STUDENTS

If a student behaves in a way that is clearly unacceptable, is in violation of the code of conduct, or violates a law of the host country, you must respond quickly. As the faculty leader of the program, you have discretion in how to respond to student behavior issues. You might create an individual behavior contract which describes the initial infraction, details what type of behavior is expected of the student in the future, and explicitly states consequences if there are deviations from the expected behavior (usually immediate dismissal from the program and return home). In those cases where a participant has violated a host country law, your ability to act may be limited. Contact Study Abroad immediately in such a case.

You do have authority to remove a student from your program if you feel it is merited, and the student then is returned home at their own expense. See below for the process.

Whenever student conduct reaches a level where a behavior contract or expulsion is necessary, it is essential that you fully document the initial event(s), any and all actions that you or other responsible parties may have taken, and all sanctions imposed, and the student’s responses.

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REMOVING A STUDENT FROM A PROGRAM

It is unlikely you will ever have to remove a student from your program, but it does happen. You do have some obligations and responsibilities in these cases. You must make sure that due process has been
followed. You should be able to prove that the student(s) was informed early in the program of what the conduct rules were and consequences if the rules weren’t followed. Of course you should make sure you have actual evidence that there has been a violation, and that the student(s) has been asked to account for their behavior. (Sometimes there are reasonable explanations.)

If you feel you need to remove a student from the program, do the following:

1. Document the student’s behavior, specific incident(s), and your responses to each. Use the incident report form. Note any violations of local law, WSU code of conduct, acceptable local standards and customs, etc. Your documentation should include notes about the impact or potential impact of the student’s action on the individual or group’s health or safety, the group’s relationship with local hosts and partners, and/or negative impact on WSU’s reputation or ability to offer similar programs in that location in the future.

2. Fully document all discussions you have with the student, including attempts to understand any underlying causes, discussion of expectations for acceptable behavior, and, if applicable, any written or verbal warnings or behavior contracts. Also document any response to each incident on the part of local partners or other students in the group.

3. Contact the Assistant Director to discuss the behavior violation, the steps you’ve taken, and the procedure for sending the student home. Things we’ll discuss include when and how to remove the student from the program, logistics of getting them to the airport, when and how they will be informed of the expulsion (keeping the impact on the rest of the group in mind) and, when appropriate, how parents/guardians will be notified.

4. A student who is sent home needs to be accompanied to the nearest airport to make sure the student arrives there safely and gets through security. The student will be instructed to continually check in via text, Whatsapp, Viber, etc. with Study Abroad staff so they are aware of the student’s travel status.

5. Whenever possible, the return flight will be rebooked by the travel agency that made the original booking. This will incur a change fee and an adjusted airfare ticket fee that will be charged to the student’s WSU account. If the flight can’t be rebooked by the travel agency or is too challenging to rebook, the flight will be booked using the student’s own credit card, or the faculty leader’s WSU credit card if the student doesn’t have a personal credit card. Any time a student is returning early from a program, you will be in touch with the Assistant Director of Study Abroad for Faculty-led Programs to help facilitate securing the student’s return airfare ticket.

6. All information regarding the student’s violation of a code of conduct will be communicated to the WSU Director of Student Conduct & Citizenship and a conduct case will be opened on campus.

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**TITLE IX AND RESPONSIBILITIES OF PROGRAM LEADERS**

Title IX is a federal law that prevents discrimination based on sex. Most people remember it as the law granting girls and women equal access to academic and athletic opportunities at schools, colleges and universities. However, Title IX also protects students from:

- sexual harassment
- stalking
• dating/relationship violence
• sexual violence, including assault, battery and rape

Campuses must provide a way for students to file complaints of sexual harassment and sexual violence and then fully investigate each claim. Training and prevention programs are required as are reports on campus sexual assault statistics.

What this means for off-campus study program leaders is that you have reporting responsibilities under the law. As a mandated reporter, you must understand:

• what Title IX is and what constitutes sexual misconduct or harassment;
• the WSU sexual violence policy and Minnesota State sexual harassment policy recommendations;
• your reporting responsibilities and protocol for reporting;
• student rights under Title IX; and
• what to say to a student who may disclose an incident they have seen or experienced.

See Appendix D for more information on this topic. The next section contains helpful information you can use when talking with students about this topic.
TIPS FOR TALKING WITH STUDENTS ABOUT SEXUAL HARASSMENT AND SEXUAL ASSAULT

Appropriate behavior for young women and men varies from country to country, and even within some countries. (For instance, behavior and dress that are acceptable in major cities may be inappropriate in rural areas, or vice versa.) In one of the pre-departure meetings with students, you should talk about gender roles and norms at the destination, and provide guidance for students about how to behave and what to expect. In some countries, simple friendliness on the part of a U.S. woman may be interpreted as flirtation to a man from a country where gender roles are more rigid than in the U.S. Likewise, the way a U.S. man interacts with a local woman may be perceived as aggressive when it was only intended to be friendly. In many parts of the world, U.S. women and men are perceived as promiscuous. This may be a stereotype, but it does derive from the images that are projected by U.S. movies and media.

In spite of your or your students’ efforts to be culturally appropriate, harassment may still occur. In some countries, women are routinely whistled at, pinched, and even grabbed, especially foreign women. Young men may be harassed by locals who have stereotypes about U.S. males. As the faculty leader, you will need to find a balance between helping your students understand any cultural dimensions in this behavior, while also ensuring the student’s right to a safe experience. You don’t want to tell them to “be less sensitive,” but you do want to help them process what is happening.

If one of your students is sexually assaulted, you should immediately contact the Title IX director at WSU, Lori Mikl. You will also need to complete an incident report form for Study Abroad. Make sure the affected student knows his/her rights.

CRISIS SITUATIONS AND RESPONSES

As a faculty-led program leader you must be prepared to respond to health and safety problems. You will follow the WSU Crisis Management Plan for Off-Campus Study Programs in responding to any health or safety concern while on the program. This Plan has specific guidelines, including a list of who is responsible for what under a variety of conditions (see Appendix B).

Furthermore, while you are leading a program you become a Campus Security Authority because during the duration of the program you have a “significant responsibility for student and campus activities” and are mandated to report those crimes falling within the Campus Security Act.5

If there is an emergency, contact Study Abroad right away, regardless of the location of your program. Even if you think the health or safety issue is minor, please contact us anyway. This puts us in the loop, and helps us should a student’s parent contact us because (inevitably) the student will have called home first.

If an unavoidable event such as epidemic, civil unrest, or damaging weather conditions such as a cyclone or tornado occurs once the program has arrived at its destination, Study Abroad will work with you and

5 Commonly referred to as the “Clery Act,” this mandates that universities report campus crime statistics and security measures including at off-campus locations. See http://counsel.cua.edu/fedlaw/campussecurity.cfm for more information.
contacts on the ground to ensure program continuity at a safe location, or will work with you to get the group home as quickly and judiciously as possible.

Please remember that students may not be left alone in a hospital without a designated person remaining with the student (including overnight). If you find yourself in this situation, contact Study Abroad immediately. We will help you figure out how to ensure the hospitalized student’s safety, while also continuing with your planned program activities. Solutions might include asking a second student to stay at the hospital, finding personnel support through Study Abroad connections in-country, or reorganizing your planned itinerary if needed.

ACCOMPANYING FAMILY MEMBERS

Faculty spouses/partners who are not employed by WSU may accompany the faculty leader with prior approval from Study Abroad, and will pay their own expenses unless they are serving as a second instructor for the course and have been approved by the appropriate College, Department, and/or Provost’s Office for this role. In our experience, students rarely appreciate one of their instructors having a spouse or partner shadowing the group because they view it as a distraction for the faculty member and it often raises student concerns or misunderstandings about the use of the program fees they paid. The addition of an accompanying adult can also pose a dilemma for the faculty leader if there is a crisis or emergency. The responsibility of the leader is to ensure the safety of the students; their attention should not be distracted by concerns over their accompanying spouse/partner. For these reasons, requests to take an accompanying adult will be considered very carefully and approval to take an accompanying adult will result only after conversations with the faculty leader(s), Legal Affairs, and the Dean.

Likewise, faculty leaders must request approval in order to take dependent children on WSU-sponsored programs because this may unintentionally hinder the faculty leader’s focus on the WSU students participating in the program. If you wish to travel with dependent children, this must be stated in your faculty-led program application. Approval may be granted after discussion with Legal Affairs, the Dean, and the Provost’s office. If approval is granted for you to travel with dependent children, an additional, non-teaching adult must accompany the group to provide child care. Faculty leaders must pay the travel expenses for dependent children and the child care provider, and must provide Study Abroad with evidence of insurance coverage abroad for both children and child care provider. Faculty taking dependent children must agree to the expectations for meeting contact hour requirements, participating in all curricular and co-curricular activities and excursions, and providing emergency support for the enrolled students. It is critical for the faculty leader to understand their primary responsibility is to the students while on the faculty-led program. Their attention should not be distracted by concerns over accompanying dependent children/child care provider. If there is a crisis or emergency, the faculty leader’s first responsibility is to ensure the health and safety of the students on the program, not the health and safety of the dependent children/child care provider.

Because costs for accompanying spouses/partners and/or children cannot be covered by WSU funds, the Business Office will not book any reservations for non-WSU accompanying people. You must work with your own travel agent, or handle the booking yourself. Please understand that traveling with your family members does pose some budgetary and logistical challenges for you. Please know that any non-WSU accompanying people cannot ride in any rental vehicles paid for by WSU.
Faculty and students are expected to comply with codes of conduct, and these apply equally abroad as in the U.S. They include:

- MnState Employee Code of Conduct: http://www.minnstate.edu/board/procedure/1c0p1.html
- WSU Student Conduct Code: http://www.winona.edu/sld/studentconductcode.asp
- WSU Alcohol and Drug Policy: http://www.winona.edu/sld/alcoholdrugpolicies.asp

Other MnState Board of Trustees policies also apply:

- Policy 1A.10 (Long-Term Emergency Management): http://www.minnstate.edu/board/policy/1a10.html
- Policy 5.19.3.1 (Driver’s License Record Check): http://www.minnstate.edu/board/procedure/519p3g1.html
- Policy 5.19.3 (Travel Management): http://www.minnstate.edu/board/procedure/519p3.html
- Policy 3.41.1 Education Abroad Procedure: http://www.minnstate.edu/board/procedure/341p1.html

MANAGING PROGRAM FINANCES

In your role as on-site financial manager, you will manage discretionary funds, keep financial records, and make payments that haven’t already been pre-paid. All of the program funds are State of Minnesota funds and day-to-day expenditures must be clearly documented. This task simply requires some organization, and Study Abroad will provide you with a method for tracking your receipts and expenses.

When you return to WSU after the program, Study Abroad will collect your receipts and itemizations (please organize these before submitting). Keep receipts for items paid in cash separate from receipts paid using the credit card. Organize each pile of receipts in chronological order of date of purchase. If any receipt has food/drinks purchased, please identify the faculty meals; if no faculty meals are included in the purchases please write “no faculty meals” on the receipt. It is the State of Minnesota policy that an itemized paid receipt is required as verification for how State funds are used. Always request an itemized receipt. If for some reason the vendor is unable to provide an itemized receipt, use the receipt book you were given by the Assistant Director and write an itemized receipt. Ask the vendor to sign it. Be conscientious about this. You may find it an unwelcome clerical task given your other teaching and travel responsibilities, but the trust and confidence that WSU places in you to lead a faculty-led program comes with such fiduciary accountability.
The program should operate within the estimated cost range stated in the promotional materials. You must submit all paid itemized receipts organized by date to the Assistant Director shortly after the program conclusion (3-5 business days). The Assistant Director will meet with you to review receipts, complete an expense report (if applicable), etc. This meeting will be added to your calendar by the Assistant Director prior to your departure. After all receipts are reconciled and expenses are paid, the Assistant Director will email you a financial report for your program that includes the budgeted amounts and the actual expenses.

If your program returns in the red, it will have implications for cost centers in your department. There is no “slush fund” to cover overages that occur for reasons other than serious emergency situations that threaten health or safety (for which there is indeed an emergency fund).

The bottom line here is that your program budget has been designed to offer you sufficient flexibility so that the unexpected group meal or additional transportation cost will not be a problem. But as the financial manager you will need to work closely with the Assistant Director to thoroughly understand your program budget, what amount of money you can spend on the ground, and how to record your expenses.

PREPAYMENTS

Study Abroad will pre-pay as many expenses as possible prior to your program’s departure using either a University credit card or by wire transfer. This will reduce the amount of cash you will need to carry and also simplify some of your financial responsibilities on the ground. In very unusual circumstances the Business Office may ask you to carry a University check to the destination, but this would be discussed with you and Study Abroad prior to departure.

THIRD PARTY CONTRACTS

Please note that only designated University officials may sign third party contracts. Faculty leaders should not engage in negotiations, or sign contracts with, any third party providers.

CASH ADVANCES, CREDIT CARDS, AND ATMS

WSU will not issue cash advances to faculty leaders prior to departure, except in unusual circumstances and with prior approval of the Business Office. Staff in Study Abroad and the Business Office will discuss this if it is relevant for you.

Generally you will access needed cash from ATMs, and you will be issued a WSU credit card for this purpose (if there are two faculty leaders, each will be issued a WSU credit card). You must return to WSU with the ATM slip and the hard copies of itemized receipts. Without both the ATM slip and the receipts, you must reimburse the University for any unaccounted funds. The daily cash advance maximum is $1,000 USD. The maximum cash advance amount per transaction is $500 (i.e. you could pull two $500 USD cash advances per day to reach the $1,000 cash advance daily maximum amount). The cost of the cash advance fee(s) will be built into the program budget.
STIPENDS/GRATUITIES – INTERNATIONAL LOCATIONS

In some locations, cash stipends or gratuities are expected and a normal way of doing business in return for services. WSU Business Office guidelines must be followed for payments of cash stipends and/or gratuities. Maximum amounts for these items will be included in the program’s budget and must follow State of Minnesota guidelines for such expenditures. The maximum amount a single individual can be paid for their work with the program is $100 USD. Regardless if they provide services for 10 days or 10 minutes, the maximum amount they are allowed to be paid in cash is $100 USD. If you are interested in paying an individual more than $100 USD for their services, a Services Performed Agreement must be completed and the individual must have a W9/W-8-BEN on file with WSU. Paying honorariums and stipends are taxable expenses for the recipient. You must return to WSU with a receipt and appropriate documentation of the service(s) performed for all stipends/gratuities you pay. This will be discussed in detail with Study Abroad and Business Office staff.

STIPENDS/GRATUITIES – UNITED STATES LOCATIONS

MinnState financial policy prohibits the payment of tips to service providers in the U.S., with the exception of baggage handling and food. Prior to your departure the Business Office and Study Abroad will discuss such services with you, including a maximum amount for this budget line. Paying cash tips to house keepers, maid staff, etc. at a lodging location is not permitted by the State of Minnesota. If you plan to tip staff at lodging locations for their services, work with the company to invoice the tips so WSU pays the tips along with the charges for the room/tax using a credit card or wire transfer.

The maximum amount a single individual can be paid for their work with the program is $100 USD. Regardless if they provide services for 10 days or 10 minutes, the maximum amount they are allowed to be paid in cash is $100 USD. If you are interested in paying an individual more than $100 USD for their services, a Services Performed Agreement must be completed and the individual must have a W9/W-8-BEN on file with WSU. Paying honorariums and stipends are taxable expenses for the recipient. You must return to WSU with a receipt and appropriate documentation of the service(s) performed. This will be discussed in detail with Study Abroad and Business Office staff.

If paying an individual more than $100 USD for their services, the Business Office strongly recommends that the individual themselves mail the completed W9/W-8-BEN form directly back to the WSU Business Office. Payment will be made by WSU to the individual performing the service after both the W9/W-8-BEN and the Services Performed Form have been received. Payments can take up to 30 days to process. Please note, if an individual is a current State of Minnesota employee, the Study Abroad or Business office should be informed, as there is a separate process for these individuals.
INCLUDING COMMUNITY MEMBERS IN YOUR PROGRAM

On the proposal form you were asked to indicate whether you were willing to allow community members to enroll in your program. If you answered yes, this section will help you work with that process.

A good time to consider whether your destination or content are a good fit for members of the community is early in your planning process. Is there a natural audience for your course? Will community members be required to participate in all activities just like the students? A good example of a well-designed course that included both students and community members is *Peru: Weaving Traditions*, taught by Prof. Vanessa Fernandez-Greene in May 2018. The focus of this course was of keen interest to members of the community interested in fiber arts (and Winona has a thriving yarn store). There are both benefits as well as challenges in designing a course that combines both college students and community members, so think carefully about this and make sure to discuss with Study Abroad staff early in the planning process.

When developing program deadlines for an off-campus course including both community members and students, the deadlines for payment, cancelling, etc. should be the same for each group. Work closely with Study Abroad when setting deadlines and developing communication to share with all participants.

RECRUITING COMMUNITY MEMBERS

Obviously the process of recruiting in the community is different than on campus. Consider the specific professional or interest groups in the area, and design posters, outreach, or interest sessions to take place in physical locations those groups frequent. Consider putting posters in the YMCA, the Bluff Country Food Coop, coffee houses, and other gathering spaces in town.

Contact information on any outreach efforts should include both you and Study Abroad staff.

COURSE REGISTRATION FOR COMMUNITY MEMBERS

Community members must enroll in the course for academic credit, just like students. They may enroll as an auditor, rather than for a letter grade, but official registration ensures that community members have the same rights and responsibilities as regular undergraduates. This includes insurance coverage during the program and access to the logistics, health, and safety oversight WSU offers for all faculty-led programs. It also includes paying their portion of the program costs just like undergraduate students do, and submitting required forms and documents via their application portal in Terra Dotta in the same way other students do. Community participants complete the same forms for Study Abroad that we require of students, e.g., a waiver, health information materials, etc. As program leader, you have the right to accept, reject, or waitlist a community applicant just like you do a student applicant.

If you are interested in allowing community members to participate in your program, talk with the Assistant Director of Study Abroad for Faculty-led Programs early in the planning process to discuss course registration for community members. You need a minimum of 10 credit-seeking students/community members enrolled in the course.
GROUP DYNAMICS

You will need to be very clear with community members about your expectations for their participation. If the individual is auditing, rather than taking the course for a letter grade, it permits them to attend a course without performing graded work. Is this conducive to your course? How would this impact the group dynamic knowing other students are taking the course as a grade? Your expectations should be stated from the outset, even in promotional materials, and can be said as simply as: “Community participants are expected to engage in all assignments and activities alongside students.”

Bear in mind that students often don’t appreciate having accompanying adults along on what they consider their educational experience, even when those adults are learning as well. You will need to think well about how to handle the unique group dynamics that might occur. Will all participants have the same rules (e.g., no alcohol use, go out at night only in pairs, be on time every morning, etc.)? Or will the community members get to be more independent? Make decisions about these things ahead of time, and be very explicit with all participants in your program about the ground rules and why they are what they are.

HEALTH AND SAFETY CONSIDERATIONS

Be very explicit with all participants (community members as well as students) regarding the pace of travel, the degree of difficulty of activities, the comfort level of the lodging you’ve selected, and any specific health concerns that should be noted (as example, that you will be at high altitudes for part of the program, or that there will be extensive city walking over cobblestones). Many mature adults are very fit and may be more able to adapt to the demands of your program than your regular students are, but others may not be. You should decide ahead of time how you will accommodate degrees of ability.

FINANCIAL AND CANCELLATION POLICIES

The same financial and cancellation policies apply for community members as for students.
RETURN TO CAMPUS

At the conclusion of the program, Study Abroad will ask your students to complete an electronic evaluation concerning academic, organizational, and logistical aspects of the program. Results will be shared with you once your grades have been submitted. If you decide to teach the course again and submit a repeat course proposal application to TSAC, the committee will receive the quantitative results from the survey, but not the narrative comments. If any serious concerns are raised in student narrative comments, these will be discussed with you by the AVP and, depending on what has been said, your department chair or Dean may be involved. You may allow release of narrative comments to TSAC through an email to Carolyn O’Grady (cogrady@winona.edu) with your approval. (Note: if you submit a proposal application for a repeat course to TSAC but have not submitted all student grades from your previous course, it is possible that TSAC will be reviewing your scored surveys before you have seen them.)

Within two weeks of return you must submit your receipts and documentation of expenditures. Within two weeks of return, faculty leaders submit a narrative report to Study Abroad that addresses various factors for your program. The report allows you an opportunity to reflect on what went well and what you might change, and also provides us with helpful information such as feedback about various logistics and any leadership or group dynamics issues you faced.
LINKS AND RESOURCES

GENERAL TRAVEL INFORMATION

Bureau of Consular Affairs Country Information Sheets
Information is provided for every country of the world, including location of the U.S. embassy and any consular office, health and medical considerations, drug penalties, and more.

U.S. State Department Travel Information
Find out here whether you need a visa for your destination, learn more about your destination, and get tips for staying healthy and safe while away.

U.S. State Department Students Abroad
This web page provides a wealth of information for students with tips about how to plan what to know before you go, and more.

U.S. State Department Bureau of Consular Affairs
Information about how to apply for or renew a passport.

CIA World Factbook
This provides information on history, culture, government, economy, and much more for most regions of the world. It also includes flags, maps, and time zones.

TSA Travel Tips
Find out the latest information about airport screening by TSA.

International Country Calling Codes and World Time Zones
Currency Conversion
The Ultimate Packing List (By Travelers for Travelers)

HEALTH AND SAFETY

CDC - Centers for Disease Control
Information on what vaccinations are recommended for your destination, and advice about how to find medical care while abroad.

World Health Organization
Great tips for staying healthy while traveling.

Embassy and Consulate Finder
Find an embassy or consulate closest to where you are in the world.

Sexual Assault Support
WSU Sexual Violence Resources
Sexual Assault Support and Help for Americans Abroad (SASHAA)

IDENTITY AND STUDY AWAY

Advice for Women Travelers
Advice for Students of Color:
  • Top 10 Reasons for African American students to study abroad
  • Diversity Abroad
  • The Handbook - Coping with Racism Abroad (eBook)
Advice for LGBT Travelers
Advice for Students with Disabilities
Resources for Transgender Travelers

ACKNOWLEDGEMENTS

We gratefully acknowledge the following resources used in the development of this handbook:

  • The Forum on Education Abroad: Standards of Good Practice.
  • NAFSA: Faculty Led Programs Resources.
  • Portland State University: International Faculty Led Programs Program Design and Operations Handbook.
  • Santa Fe College: Study Abroad Faculty Handbook.
APPENDICES

Appendix A.......................................................................................................................................................Checklist of Responsibilities

Appendix B..........................................................................................................................................................Crisis Management Plan

Appendix C.........................................................................................................................................................Sample Behavioral Contract

Appendix D................................................................................................................................................................Title IX

Appendix E............................................................................................................................................................Helpful Definitions
Checklist of Faculty-led Programs Responsibilities:
Who does what, and when!

X = primary
√ = secondary

Contact: Kathy Jicinsky, Asst. Director for Faculty-Led Programs: kathy.jicinsky@winona.edu

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<thead>
<tr>
<th>Activity</th>
<th>Study Abroad</th>
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<th>TSAC</th>
<th>Business Office</th>
<th>Notes</th>
<th>Timeline/Links</th>
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<tbody>
<tr>
<td><strong>Prior to Proposal Approval</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
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</tr>
<tr>
<td>1</td>
<td>Explore the possibility of leading a program</td>
<td>X</td>
<td></td>
<td></td>
<td>Meet with Asst Director for Faculty-led Programs to understand overall process. Review Faculty Handbook (hard copy or online), review proposal application (online).</td>
<td>Study Abroad Website - Faculty Handbook link, proposal application information</td>
</tr>
<tr>
<td>2</td>
<td>Look into possibility of applying for exploratory funds to visit a potential program site</td>
<td>X</td>
<td>X</td>
<td></td>
<td>Apply online at least one year prior to submitting the proposal. Contact Asst Director for Faculty-led Programs with questions.</td>
<td>Study Abroad Website - Exploratory Application Link</td>
</tr>
<tr>
<td>3</td>
<td>Submit report after return from exploratory.</td>
<td>X</td>
<td></td>
<td></td>
<td>Required before reimbursement can occur, and before proposal submission. Exploratory report template is online.</td>
<td>Study Abroad Website - Exploratory Report Template</td>
</tr>
<tr>
<td>4</td>
<td>Prepare the proposal/plan the academics</td>
<td>X</td>
<td></td>
<td></td>
<td>Collaborate with Asst Director for Faculty-led Programs or other faculty for input/advice.</td>
<td>Submit by January 15 deadline (or the Monday immediately following if January 15 is on a weekend)</td>
</tr>
<tr>
<td>5</td>
<td>Explore logistics (accommodation, travel, etc.)</td>
<td>X</td>
<td>X</td>
<td></td>
<td>Fac provide info they have gleaned; Study Abroad oversees all logistics.</td>
<td>During exploratory process and while developing the proposal. Logistics finalized shortly after proposal approved.</td>
</tr>
<tr>
<td>6</td>
<td>Meet with approved travel arrangers organized by Study Abroad</td>
<td>X</td>
<td>X</td>
<td></td>
<td>Faculty are highly encouraged to use travel arrangers who will assist Study Abroad in handling logistics planning to relieve faculty of this burden.</td>
<td>During exploratory process and while developing the proposal. Course cost range determined after proposal approval and finalized <strong>three months prior</strong> to departure.</td>
</tr>
<tr>
<td>7</td>
<td>Budget formulation</td>
<td>X</td>
<td>V</td>
<td></td>
<td>In collaboration with faculty leader(s) but Study Abroad oversees budget.</td>
<td></td>
</tr>
<tr>
<td>8</td>
<td>Review/approve proposal</td>
<td></td>
<td></td>
<td></td>
<td>TSAC reviews within the month following proposal submission. Faculty submitting new proposals are invited to meeting.</td>
<td></td>
</tr>
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</table>

**After Proposal is Approved**

Revised 8/1/2018
## Checklist of Faculty-led Programs Responsibilities:
Who does what, and when!

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<tbody>
<tr>
<td>9</td>
<td>X</td>
<td>V</td>
<td>X</td>
<td></td>
<td>If using a travel provider and the payment is greater than $50,000, an RFP must be conducted prior to selecting a vendor. The Asst Director for Faculty-led Programs will talk with faculty about this and provide information.</td>
<td></td>
</tr>
<tr>
<td>10</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
<td>Needed for financial aid to advise students on their aid awards relevant to faculty-led programs.</td>
<td></td>
</tr>
<tr>
<td>11</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
<td>Handled by faculty’s department admin.</td>
<td></td>
</tr>
<tr>
<td>12</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
<td>All applications are completed online, coordinated by Study Abroad.</td>
<td></td>
</tr>
<tr>
<td>13</td>
<td>V</td>
<td>X</td>
<td></td>
<td></td>
<td>Study Abroad in conjunction with Creative Services will work with faculty to create a poster and/or brochure. Cost of printing marketing materials comes from course budget. Faculty are encouraged to hold recruiting sessions; Study Abroad office will work with them to reserve space and inform WSU Updates.</td>
<td>Recruitment may begin as soon as TSAC has approved the proposal. Students cannot sign up until all approvals are finalized (Fac Senate, M/C, etc.).</td>
</tr>
</tbody>
</table>

### Student Application Procedures

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<tr>
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<tbody>
<tr>
<td>14</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
<td>Deposit applies to the cost of the program and is refunded to the applicant’s student acct if students are not selected.</td>
</tr>
<tr>
<td>15</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
<td>Within one week of completed application.</td>
</tr>
<tr>
<td>16</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
<td>Within one week of completed application.</td>
</tr>
<tr>
<td>17</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
<td>One week after completed application.</td>
</tr>
<tr>
<td>Activity</td>
<td>Study Abroad</td>
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<td>TSAC</td>
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</tr>
<tr>
<td>18</td>
<td>Review applications, interview applicants, select participants.</td>
<td>X</td>
<td></td>
<td></td>
<td>Faculty are strongly encouraged to interview applicants before deciding who to accept, waitlist, or deny.</td>
</tr>
<tr>
<td>19</td>
<td>Inform applicants of their status (approved, denied, waitlisted)</td>
<td>X</td>
<td>V</td>
<td></td>
<td>Faculty are encouraged to send follow up email to admitted students.</td>
</tr>
<tr>
<td>20</td>
<td>Student withdrawal deadline</td>
<td>X</td>
<td></td>
<td></td>
<td>Students may not withdraw past this point; they are now responsible for the full program cost regardless of participation.</td>
</tr>
<tr>
<td>21</td>
<td>Student course registration</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>22</td>
<td>Student accounts are billed</td>
<td>X</td>
<td></td>
<td></td>
<td>Billing is finalized <strong>90 days prior to departure</strong>.</td>
</tr>
<tr>
<td><strong>Prior to Departure</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>23</td>
<td>Book flight, hotels, other logistics</td>
<td>X</td>
<td></td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>24</td>
<td>Course confirmed as a &quot;go&quot; or is cancelled, depending on student enrollment.</td>
<td>X</td>
<td>V</td>
<td></td>
<td>Course cancelled to avoid additional unreimbursable expenses, and to allow students to choose another open course.</td>
</tr>
<tr>
<td>25</td>
<td>Pre-departure orientation - general info</td>
<td>X</td>
<td></td>
<td></td>
<td>Covers generic health, safety, and cultural information and general WSU policy information.</td>
</tr>
<tr>
<td>26</td>
<td>Pre-departure orientation - course specific</td>
<td>X</td>
<td></td>
<td></td>
<td>At least one meeting should be planned prior to departure; faculty are welcome and encouraged to hold more.</td>
</tr>
<tr>
<td>27</td>
<td>State Department registration</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>28</td>
<td>Cash advance request</td>
<td>X</td>
<td>V</td>
<td>X</td>
<td>Advances approved only in unusual circumstances. On-site cash will be accessed via WSU credit card.</td>
</tr>
<tr>
<td>29</td>
<td>WSU credit card issued</td>
<td>X</td>
<td></td>
<td>X</td>
<td>Credit card will be used to access on-site ATMs.</td>
</tr>
<tr>
<td>30</td>
<td>International health insurance registration</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>31</td>
<td>On-site contact info collected for entire itinerary</td>
<td>X</td>
<td></td>
<td></td>
<td>On-site phone, email, and contact names.</td>
</tr>
<tr>
<td>Activity</td>
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<td>------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>32 Emergency Contact Info collected from faculty leaders</td>
<td>X</td>
<td>V</td>
<td></td>
<td></td>
<td>Local contacts in case of an emergency involving one of the program leaders.</td>
</tr>
<tr>
<td>33 Finalize details/process for on-site payments, finances, logistics, receipts, and receive insurance info, receipt logs, and other details.</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
<td>Meet together to go over all.</td>
</tr>
<tr>
<td>After Departure</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>34 While Off-Campus, contact Study Abroad if any unusual event occurs (accident, theft, student illness, etc.)</td>
<td>V</td>
<td>X</td>
<td></td>
<td></td>
<td>Study Abroad mandated reporting responsibilities, and general oversight of health/safety, requires the office is informed regularly.</td>
</tr>
<tr>
<td>Return to Campus</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>35 Re-entry gatherings/meetings with students</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Faculty can build such gatherings into the program budget when doing initial planning.</td>
</tr>
<tr>
<td>36 Program evaluation</td>
<td>X</td>
<td>V</td>
<td></td>
<td></td>
<td>Faculty are asked to encourage students to complete the online evaluation. Results shared with faculty after grades submitted.</td>
</tr>
<tr>
<td>37 Faculty turn in all expense sheets, organized itemized receipts, services performed documents, and credit card to Study Abroad</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
<td>Within one week of return.</td>
</tr>
<tr>
<td>38 Faculty Narrative Report due from program leaders</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Narrative report template is online.</td>
</tr>
<tr>
<td>39 Program account reconciled.</td>
<td>X</td>
<td></td>
<td></td>
<td>X</td>
<td>Timing of reconciliation depends on when course falls in fiscal year, and when students complete their payments.</td>
</tr>
<tr>
<td>40 Faculty may complete Surplus Fund Application to request carry over of a portion of the surplus funds.</td>
<td>X</td>
<td></td>
<td></td>
<td>X</td>
<td>Apps accepted once budget reconciliation has been completed and all expenses paid. No refunds to students will be issued from a surplus.</td>
</tr>
<tr>
<td>41 Faculty may submit a repeat proposal application if they hope to teach the course again.</td>
<td></td>
<td></td>
<td></td>
<td>X</td>
<td></td>
</tr>
</tbody>
</table>
Crisis Management Plan for
WSU Off-Campus Study Programs (semester or faculty-led)

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This document provides a master plan for responding to crises that occur when Winona State University faculty and students are on credit-bearing study away overseen by Study Abroad.

Any emergency or crisis, whether real or perceived, requires a response from the home institution. Although no plan will apply to every situation, a common set of factors must be examined in every case. These have been organized below in the form of a checklist that can be used to guide response by WSU to emergencies facing a study abroad program (either short-term or semester/year-long).

Before a crisis occurs abroad, the Study Abroad office will:
1. File the names of the study abroad travelers, itineraries, and emergency contact information with the U.S. State Department (Smart Traveler Enrollment Program).
2. Provide faculty leaders of off-campus study programs with contact information at the University in case of emergency.
3. Provide information on how to contact the U.S. embassy at the destination.
4. Offer a training session for all faculty members leading groups of students on off-campus study programs.
5. Regularly review our list of campus, local community, and state agencies and individuals who would be helpful in an emergency.
6. Utilize a set of procedures to review and approve off-campus study experiences.
7. Provide each student with emergency insurance coverage, currently through HTH Worldwide.

**Study Away Emergency/Crisis Management Team**

The Center for Global Education Assistant Vice President is the primary contact for/to parents and with on-site officials, and usually will be the individual coordinating the overall response. The Director of Communications, Marketing, and Media Relations or designee will act as the official spokesperson to media sources.

- Carolyn O’Grady, AVP Center for Global Education  
- Kemale Pinar, Director, International Student and Scholar Services  
- Susan Niedzwiecki-Pham, Director of Study Away, Study Abroad Office  
- Patricia Rogers, VP for Academic Affairs and Provost  
- Karen Johnson, Dean of Students  
- Andrea Northam, Interim Director for Communication, Marketing, and Media Relations  
- Christopher Cichosz, Director of Campus Security and/or Erin Paulson, University Safety Director  
- Lori Mikl, Director of Legal Affairs  
- Denise McDowell, VP for Enrollment Management and Student Affairs  
- Other individuals may be included as needed, depending on the specific circumstances of the event.

**Conditions Requiring Crisis Management**

Study Abroad staff should be contacted immediately (by faculty leader or host provider) in any of the following circumstances involving a WSU participant:

- Any illness, injury or death.
- Emotional or psychological stress that appears to require professional attention or removal of the participant from the situation.
- A participant is the victim of a crime, e.g., theft, assault, rape, harassment, etc., or being accused of committing any crime.
- A participant appears to be missing.
- Any situation that causes serious concern for the safety of participants, i.e., a political uprising or a natural disaster.

**Responsibilities of the On-Site Program Director**

**Student/Program Director Minor Illness/Injury**

1. Ask student/Program Director to describe their symptoms.
2. Program Director conveys three messages:
   a. I’m sorry you’re not feeling well.
   b. You are going to be OK.
   c. You are not alone.
3. Program Director supports student/Program Director in determining best solution (over the counter medicine, rest and fluids, bandage, etc.). If medical attention is warranted, please contact local medical care right away.
4. Write notes about situation: name, condition, treatment plan.
5. Monitor (check on ill/injured person at regular and reasonable intervals to assess condition).
6. Send e-mail message to a Study Abroad staff member (see contact list p. 13). Include name, condition, treatment plan, and progress so far.
7. Send another e-mail message when the condition is resolved.
8. If symptoms escalate, call local medical care (you can go to any local medical care facility that works with HTH - information for your locations can be found on the HTH website (https://www.hthstudents.com). You can also call HTH directly for assistance (1-888-243-2358 or +1-610-254-8769).
9. If condition significantly worsens, this qualifies as an emergency and you should start an Incident Report Form.

**Student/Program Director Major Illness/Injury**

1. Contact local medical care--call the country’s equivalent of 911 for emergency illness/injury (see document provided in your materials). You can go to any local medical care for emergency and non-emergency situations (you can also go to any local medical care facility that works directly with HTH. Information for your locations can be found on the HTH website (https://www.hthstudents.com). You can also call HTH directly for assistance (1-888-243-2358 or +1-610-254-8769).
2. Start an Incident Report Form to organize needed information and to keep an ongoing log (including times) as the situation progresses.
3. Divide duties between Program Directors (e.g. Program Director A will travel to health care facility with student; Program Director B will take rest of group to hotel, next activity, meal, etc.). If there is only one Program Director, or a Program Director is ill or incapacitated, ask a local contact to assist or possibly a senior student in the group. Be sure to include who is accompanying who on the Preliminary Incident Information report.
4. As soon as the situation is stable (meaning as soon as the ill or injured person has gotten to appropriate medical care, and the rest of the group is safe and accounted for) call Study Abroad with details. WSU will notify insurance and the person’s emergency contact.
5. If medical evacuation is necessary, this will be coordinated by WSU through our insurance company.
6. HTH will most likely contact the Program Director directly for details as needed.
7. WSU will let the Program Director know if a WSU staff member will travel to be with the injured/ill person.
8. The Program Director should direct any press queries to the WSU Communications Office. The Program Director can tell the press, “No comment. Please contact WSU Office of Communications.”
9. If the student/Program Director consents, brief the group on the person’s health status. If the student/Program Director does not consent, do your best to convey to the group that the situation is being addressed appropriately and that the person has asked that everyone respect his/her privacy.
10. If a student is hospitalized, one Program Director must stay in that location to be with the student. If determined to be appropriate after consultation with WSU, the other Program Director may continue the planned itinerary with the rest of the group. If there is no second Program Director, a decision about next steps will be made in consultation between WSU and the sole Program Director.
11. If a Program Director is hospitalized, when possible/appropriate, a local guide can serve as the other Program Director to continue the planned itinerary with the group. In some cases, a representative from WSU may travel to join the group and serve as the second Program Director.
12. Throughout the incident, the Program Director will be in regular communication with Study Abroad. Changes in status noted on the ongoing Incident Report Form will also be kept in a log at WSU.
13. The Program Director will submit all notes on the situation upon returning to WSU. Please keep them in a safe place!
14. The Program Directors will debrief about the incident with Study Abroad staff upon return to WSU.

**Transportation Accident**

1. Account for everyone in the group.
2. If police/emergency people are not on the scene, call them (use country equivalent of 911, see document provided in your materials).
3. Identify any injured people and direct emergency personnel to them.
4. Ensure the safety of all members of the group.
5. Divide duties between Program Directors (e.g. Program Director A will travel to health care facility with student; Program Director B will take rest of group to hotel, next activity, meal, etc.). If a Program Director is ill or incapacitated, or if there is only one Program Director, ask a local guide or other local contact, or possibly a senior student, to assist.
6. Start completing the Incident Report Form. Be sure to note times and all actions taken.
7. As soon as the situation is stable (meaning as soon as the ill or injured person has gotten to appropriate medical care, and the rest of the group is safe and accounted for) call Study Abroad with details. WSU will notify insurance and the person’s emergency contact.
8. If medical evacuation is necessary, this will be coordinated by WSU through our insurance company.
9. HTH will most likely contact the Program Director directly for details as needed.
10. Get the non-injured students and a Program Director (if possible) back to the accommodation location to regroup.
11. WSU will let the Program Director know if a WSU staff member will travel to be with the injured/ill person.
12. The Program Director should direct any press queries to the WSU Communications Office. The Program Director can tell the press, “No comment. Please contact the Office of Communications at WSU.”
13. If a student or the Program Director is hospitalized, when possible/appropriate, a local guide can serve as the other Program Director to continue the planned itinerary with the group. In some cases, a representative from WSU may travel to join the group and serve as the second Program Director.
14. Throughout the incident, the Program Director will be in regular communication with Study Abroad. Changes in status noted on the ongoing Incident Report Form will also be kept in a log at WSU.
15. If the student/Program Director consents, brief the group on the person’s health status. If the student/Program Director does not consent, do your best to convey to the group that the situation is being addressed appropriately and that the person has asked that everyone respect his/her privacy.
16. Throughout the incident, the Program Director will be in regular communication with Study Abroad. Changes in status noted on the ongoing Incident Report Form will also be kept in a log at WSU.
17. The Program Director will submit all notes on the situation upon returning to WSU. Please keep them in a safe place!
18. The Program Directors will debrief about the incident with Study Abroad staff upon return to WSU.

**Robbery, Mugging, and/or Physical Assault**

1. Respond to the student/Program Director victim immediately.
2. Be sure the person is in a safe place and reassure them of their safety.
3. All involved staff should convey three messages:
   1. I believe you;
   2. You are not alone; and
3. **We are sorry this happened to you**

4. If police are not on the scene, call the equivalent of 911 (see document provided in your materials).
5. Obtain medical assistance as needed.
7. Suggest that the person file a police report and accompany them to do so.
8. As soon as the situation is stable (meaning as soon as the mugged person is safe and attended to, and the rest of the group is safe and accounted for) call WSU with Incident Report details.
9. Administrators at WSU will discuss the circumstances of the situation with you and help determine the next steps for the group (perhaps changing an accommodation site, plans for the rest of the day or next day, etc.).
10. The Program Director will submit all notes on the situation upon returning to WSU. Please keep them in a safe place!
11. Program Directors will debrief about the incident with Study Abroad staff upon their return.

**Student/Program Director Arrest**

NOTE: Neither the U.S. Embassy/Consulate nor Winona State University can get people out of jail, serve as interpreters, pay fees, or provide legal advice.

1. If possible, advise the arrested Program Director or student to not make any statements without a lawyer present.
2. Call the U.S. Embassy or Consulate (or if the person is not an American citizen, call their embassy).
   a. The U.S. Embassy or Consulate will provide information for local lawyers and general information about the criminal justice process.
3. Visit the student in jail.
4. Gather as much information about the circumstances as possible and start the Incident Report Form. Be sure to write down the time of day each time you make a log entry.
5. Call WSU immediately (see phone numbers on p. 13). This is critically important because we want the parent/guardian to hear from an WSU administrator, not CNN or other means!
6. To that end, do NOT contact the student’s or Program Director’s emergency contact. WSU will handle that. WSU will notify Program Directors once the emergency contact has been reached.
7. Make sure the rest of the group is in a safe location—remove them from the scene to a safe and private location as quickly as possible—one Program Director or local staff member should stay with this group. Ask that they refrain from texting or calling anyone until WSU has informed you that the emergency contact has been notified.
8. Notify host organization/institution (if relevant). Do not provide any details at this time.
9. Notify the rest of the group. Ensure that group discussion, one on one counseling, and access to WSU’s counseling center are available to the extent possible.
10. The Program Director should direct any press queries to WSU. The Program Director can tell the press, “No comment. Please contact the Office of Communications at WSU.”
11. You will be in regular contact with WSU throughout this event and WSU administrators will provide as much support as possible. Please be sure to keep good notes on the situation. Keep your notes in a log format including times as these will become part of an official incident report. Program Directors will submit all notes on the situation upon returning to WSU. Please keep them in a safe place!
12. Program Directors will debrief with Study Abroad staff upon their return to SU.
Missing Person
1. The amount of time a student/Program Director is considered missing before there needs to be a response is variable and will depend on circumstances, location, program type, etc. When in doubt, make a report.
2. Try to determine when student/PD was last seen.
4. Call WSU.
5. WSU will contact the student’s (Program Director’s) emergency contact.
6. Call local police and file a missing person’s report. Ask them to check clinic and hospital admissions and coroner’s records for unidentified bodies.
7. Notify the U.S. Embassy.
8. Provide information and reassurance to other students as appropriate.
9. Administrators at WSU will work with you to manage the situation and ongoing group plans.
10. The Program Director will submit all notes on the situation upon returning to WSU. Please keep them in a safe place!
11. Program Directors will debrief about the incident with Study Abroad staff upon their return to WSU.

Death of a Student/Program Director
1. Verify the identity of student or Program Director.
2. If they are not already on scene, notify local police. (Use the equivalent of 911, provided in your materials).
3. Gather as much information about the circumstances as possible and start the Incident Report Form. Be sure to write down the time of day each time you make a log entry.
4. Call WSU immediately (see phone numbers p. 13). This is critically important because we want the parent/guardian to hear from a WSU administrator, not CNN or other means!
5. To that end, do NOT contact the student’s or Program Director’s emergency contact. WSU will handle that. WSU will notify Program Directors once the emergency contact has been reached.
6. Make sure the rest of the group is in a safe location—remove them from the scene to a safe and private location as quickly as possible—one Program Director or local staff member should stay with this group. Ask that they refrain from texting or calling anyone until WSU has informed you that the emergency contact has been notified.
7. Call the U.S. Embassy or Consulate (or if the person is not an American citizen, call their embassy). The Consular Officer is responsible for obtaining the death certificate and other necessary documents for preparing a Foreign Service Report of Death.
8. WSU will contact insurance for repatriation and all insurance concerns. A representative from the insurance company will probably speak directly to a Program Director regarding plans and details.
9. Notify host organization/institution (if relevant). Do not provide any details at this time. A police investigation will be conducted first.
10. Notify the rest of the group. Ensure that group discussion, one on one counseling, and access to WSU’s counseling center are available to the extent possible.
11. The Program Director should direct any press queries to WSU. The Program Director can tell the press, “No comment. Please contact the Office of Communications at WSU.”
12. You will be in regular contact with WSU throughout this event and WSU administrators will provide as much support as possible. Please be sure to keep good notes on the situation. Keep your notes in a log format including times as these will become part of an official incident report. Program Directors will submit all notes on the situation upon returning to WSU. Please keep them in a safe place!
13. Program Directors will debrief with Study Abroad and other WSU staff upon their return to WSU.

Sexual Harassment, Sexual Assault, and/or Rape

1. Respond immediately. All involved staff should convey to the complainant three messages:
   a. *I believe you*;
   b. *You are not alone*; and
   c. *We are sorry this happened to you*

2. Inform complainant that faculty and staff program directors are not a confidential resource but will try to maintain the privacy of the survivor recognizing the need to balance their privacy with safety considerations and their duty to report.

3. Encourage the complainant to talk about the incident – Talking with supportive people may help complainants regain a feeling of control and help them feel less alone.

4. Listen attentively and compassionately to the details. Inform the complainant that you are required to provide a report to the Title IX Coordinator at WSU, which includes
   a. Names of students/persons involved
   b. Details of the situation
   c. Telephone number where the program director(s) can be reached
   d. What assistance is needed
   e. Confirmation of the safety of the individual(s) involved.

5. Physically separate (into a different room/building) the complainant from the accused perpetrator if the accused perpetrator is in the group/program.

6. When feasible, but *as soon as possible*, call Study Abroad (see phone numbers, p. 13).

7. Remind the complainant of the options available regarding medical care, counseling, and reporting. Remember, you can encourage (but not force) the complainant to report the incident to local authorities and/or the program site or seek medical care. If you have concerns about the integrity of local policy or local medical contacts, please discuss this with Study Abroad staff when you call.

8. If a person has just been raped and/or has been sexually assaulted and they agree to medical care, tell them to not bathe, use the bathroom, brush their teeth, change their clothes, etc. This is not for medical reasons, this is to help obtain evidence that may be used in court.

9. Start an Incident Report Form (either in the presence of the complainant or not depending upon their wishes above).

10. Report any type of sexual harassment, including sexual violence, ASAP *(within 24 hours)* to Lori Mikl, Title IX Coordinator, at (507) 457-2766 or lmikl@winona.edu. The Title IX Coordinator is responsible for ensuring that there is an appropriate institutional response to any complaint of sexual harassment, sexual violence or student sexual misconduct.

11. Administrators at WSU will get in touch to help you decide the best course of action (for the complainant and for the accused perpetrator if they also happen to be in the group); and may assist in arranging counseling by phone.

12. If medical evacuation is warranted, WSU will contact our insurance to arrange the details. The insurance company will likely also communicate directly with the Program Director.

13. Administrators at WSU will work with you throughout the event to determine the best course of action for all involved, including the rest of the group and the group’s plans.

14. The Program Director will submit all notes on the situation upon return to WSU. Please keep them in a safe place!
15. The Program Directors will debrief with Study Abroad and other WSU staff upon returning to SU.

**Regional Catastrophic Incident**
Regional tragedies are defined in this instance as a tragedy (terrorism, environmental, political unrest) in the country or neighboring countries to your program location(s) but not in the city where you are currently located and has not impacted your program directly.

1. Account for all students and Program Directors.
2. Contact WSU by phone or email **immediately** (see phone numbers p. 13).
   a. Study Abroad will facilitate student/parent contact and communications.
3. Assess the local in-person reaction (use local contacts when applicable). Questions you might answer include:
   a. What was the target of unrest, if event was political?
   b. What is the intensity of the emergency or political unrest?
   c. Are there military or emergency personnel at the site of the emergency?
   d. What is the advice of the nearest US Embassy/Consulate?
   e. What impact, if any, does emergency have on availability of food, water, and medical supplies?
   f. How able are our students/faculty to travel?
   g. Is continuation of classes in the best interest of student health and safety?
4. Read and stay informed via local media.
5. Check the **U.S. State Department** for any updates to travel advisories.
6. Make any needed alterations to your current itinerary (change city, extend stay elsewhere).
   a. Make sure students are aware of these changes
8. Program Directors will submit all notes on the situation upon return to WSU. Please keep them in a safe place!
9. Program Directors will debrief about the incident Study Abroad staff upon their return to SU.

**Large-scale Catastrophic Incident**
Large-scale Catastrophic Incidents include natural disasters, terrorism, and severe political unrest.

1. Check status of all group members. If the group is not together, work with your co-director or local provider to make a plan to locate the rest of the group.
2. If anyone is injured or deceased, alert emergency personnel. One Program Director should stay with injured/deceased. If there is only one uninjured Program Director, designate a student group leader and tell them to take the group to a particular location and stay there.
3. Get as many of the group as possible to a safe location. Then, work with emergency personnel to take care of injured/deceased. Follow protocol for injury/death when you are able to.
5. If possible, call WSU or ask someone to do so.
6. If you are able reach WSU, WSU will inform our insurance company who will provide emergency management assistance to Program Directors.
7. If you are not able to reach WSU, if possible, contact local U.S. Embassy to explain your situation and get advice and assistance. Consider contacting local contacts if they might have the ability to provide
assistance (recognizing that such an event may have rendered them unable to provide assistance).
Questions to answer might include:
   a. What was the target of unrest, if event was political?
   b. What is the intensity of the emergency or political unrest?
   c. Are there military or emergency personnel at the site of the emergency?
   d. What is the advice of the nearest US Embassy/Consulate?
   e. What impact, if any, does emergency have on availability of food, water, and medical supplies?
   f. How able are our students/faculty to travel?
   g. Is continuation of classes in the best interest of student health and safety?
8. Depending upon the scale and nature of the event, there will be many emergency management
   resources on site including local emergency responders, international NGOs, military, etc. Utilize
   whatever resources are available to you to ensure the safety and security of your group.
9. If you need to evacuate and you are not able to reach WSU, attempt to reach HTH Insurance by calling
   collect at +1-610-254-8771.
10. Use all local resources: local contacts, U.S. Embassy, emergency personnel, international NGOs, crisis
    responders, etc. to help you get out of the dangerous area.
11. Communicate your plans to a local contact and ask them to repeatedly try to reach WSU until they are
    successful.
12. As soon as you have communications, call WSU or e-mail Study Abroad staff to inform WSU where you
    are, your situation and discuss your plans.
13. Program Directors will submit all notes on the situation upon return to WSU. Please keep them in a safe
    place.
14. Program Directors will debrief about the incident with Study Abroad and the Director of Safety upon
    returning to SU.

Civil Unrest
1. If you learn about this while at your lodging site, make sure all students are accounted for and know to
   stay where they are. If you learn about this while at an activity, get to a safe location and keep everyone
   together.
2. If any students are not accounted for, do your best to reach them quickly.
3. Confirm details about affected areas by talking with local contacts and contacting the U.S. Embassy.
   Questions you might seek to answer include:
      a. What was the target of unrest, if event was political?
      b. What is the intensity of the emergency or political unrest?
      c. Are there military or emergency personnel at the site of the emergency?
      d. What is the advice of the nearest US Embassy/Consulate?
      e. What impact, if any, does emergency have on availability of food, water, and medical supplies?
      f. How able are our students/faculty to travel?
      g. Is continuation of classes in the best interest of student health and safety?
5. If possible, call WSU immediately (see phone numbers, p. 13).
6. WSU will alert our crisis insurance company.
7. If you are able to communicate with WSU (phone lines/internet are up), you will work with WSU to
   determine plan. Depending on the situation, this may include:
a. Stand fast—staying at your current location and wait for things to quiet down (this is usually the case for smaller events that are likely to resolve quickly).

b. Move to another nearby location—if the particular area where you are staying/doing activities is not safe, and it is possible to move, move the group to a safe part of the city/area. (For example, say there is a violent demonstration within 4 blocks of your hotel—that is too close for comfort. It may be easy to move to a hotel in another part of town without crossing the demonstration). If you are not able to move on your own and are in danger, you will evacuate.

c. Evacuate—if the situation escalates and is expected to last for some time, the group will evacuate the area—possibly to another city or town in the same country, or possibly to another country. Worst case scenario would be returning to the U.S. If a crisis evacuation is necessary, our insurance will manage the evacuation. Program Directors will be in regular contact with WSU and will also speak with our insurance company.

If you are not able to communicate with WSU:

8. Determine the best course of action for the group by following the guidelines above (Stand fast, move to nearby location, evacuate).

9. If you determine that you have to evacuate without being able to contact WSU, use all local resources: local contacts, U.S. Embassy, emergency personnel, international NGOs, crisis responders, etc. to help you get out of the dangerous area.

10. Communicate your plans to a local contact and ask them to repeatedly try to reach WSU until they are successful.

11. As soon as you have communications, call or email WSU to inform us where you are, your situation and discuss your plans.

12. Program Directors will submit all notes on the situation upon return to WSU. Please keep them in a safe place!

13. Program Directors will debrief about the incident with Study Abroad staff and the Director of Safety upon their return to WSU.

Responsibilities of the Study Abroad Office

When contacted concerning a serious injury, death, or emergency, the Study Abroad office will:

- Begin a log of all calls and activities pertaining to the incident, to include date and time of calls or actions.

- Gather the following information:
  o Name, location. and contact of caller (address, city, country, phone/fax number, email).
  o Time and date of call.
  o Individuals involved in the situation.
  o Time and date of situation.
  o Brief description of situation.
  o Location of accident or emergency; proximity to WSU students.
  o Phone and fax number where caller can be reached.
  o Verify that calls have been placed to emergency response services and/or U.S. Embassy/Consulate, if situation warrants.
  o Information, if any, that has been released to the media.

- If appropriate, instruct caller to call again after emergency response team and/or law enforcement have arrived at the site of the incident.
The Study Abroad office will immediately notify the following in appropriate order of needed response:
Dean of Students; Vice President for Enrollment Management and Student Life; Provost; President; Office of Communications, Marketing and Media Relations; Office of Legal Affairs, Dean(s) of the appropriate College(s).

Proceed with appropriate steps as needed, such as:
- Contact and bring together members of the study away crisis management team.
- Contact local authorities as relevant (e.g. on-site program partner, police, U.S. Embassy/Consulate) to request assistance.
- Contact the University’s risk management officer to work as appropriate with the University’s insurance provider.
- Contact parents of student or the family of faculty member to apprise them of the situation.
- Brief the official University spokesperson, the President, Provost, and other members of WSU as appropriate.
- Provide for necessary medical care, counseling, or emergency evacuation.
- Determine if funds are needed to cover emergency expenses, if necessary. Depending on the situation, such expenses may be the responsibility of student/parents or the faculty member, but WSU will advance funds as needed to assure a timely resolution of the situation.
- Consult with University legal counsel as appropriate.

**Study Abroad Action Plan Checklist**

Some or all of the following will be completed by the Study Abroad office, depending on the nature of the crisis:

- [ ] Contact US State Department (if incident is abroad).
- [ ] Contact the consulate/embassy abroad.
- [ ] Work with the study away emergency crisis management team to develop an action plan in response to the specific situation. Considerations and tasks include:
  - Appropriate immediate measures needed to preserve the health and safety of students and staff;
  - Designate an individual to assume responsibility for the situation at the home institution to ensure one individual coordinates all response. This will typically be the AVP, but may be another campus representative depending on the specific situation;
  - Appropriate course of action (dealing with initial student reaction, reiterating appropriate student behaviors, developing a written course of action, and having students acknowledge in writing receipt of such information);
  - Develop and assist with an evacuation plan, if necessary (considering the safety of various modes and routes of travel, the costs of evacuation and the method of meeting those costs, the possibility of reducing the level of threat by dispersing students in small groups to reconvene later in another locale, and available in-country resources) based on advice from US State Department and local program faculty (evacuation, move to Embassy compound, remaining on-site and maintaining low profile, quarantine, etc.);
  - Develop a communication document to be utilized by all individuals involved (consistency is crucial). Remember the privacy of students/staff involved;
  - Prepare a list of individuals to be alerted once the entire plan is in place (to include the President, Provost, other WSU offices, system office, WSU faculty, Deans, staff, students, parents and family of students abroad as appropriate);
• Develop a daily communication plan which factors in the people to include, organizations to notify and effective methods of communication to utilize (i.e., website);
• Provide the University’s designated official spokesperson with a daily bulletin until the crisis is over;
• Develop a response to parents, including notification to all parents and a coordinated response to subsequent telephone calls;
• Submit an action plan to the President of the University for a final decision.

☐ The approved action plan is transmitted to the on-site faculty member or contact.
☐ Debrief the incident with all relevant parties once it is resolved.
☐ Document in a written report all actions including any changes to the protocol.

Insurance Information

Liability Insurance
All WSU students and accompanying faculty members are covered under State of MN Risk Management Fund for general liability. More information about liability coverage can be obtained from the University’s Safety Director (507-457-5082).

HTH Worldwide
Students and accompanying faculty members on WSU faculty-led programs, and other semester and year-long students, are covered under Winona State University’s insurance with HTH Worldwide. This insurance will serve as primary health insurance in the host country and will provide medical benefits for injury and sickness. Prescription drugs are covered at 100%.
https://hthtravelinsurance.com/

Emergency Phone Numbers

U.S. State Department (if incident is abroad).
• State Department Switchboard: 202-647-4000 (Ask for the Country Desk)
• Overseas Emergency:
  o From the U.S. call 1-888-407-4747
  o From overseas call +1-202-501-4444
• After Hours Duty Officer: 202-647-1512
• List of U.S. Embassies, Consulates, and Diplomatic Missions: https://www.usembassy.gov/.

Winona State University Contacts
We recommend contacting these offices in this order:

1. Study Abroad office..................................................+1-507-457-5081
   (Office Hours: M-F, 8am-4:30PM Central Daylight Time)

2. WSU Security .................................................................+1-507-457-5555
   (Available 24 hours a day, 7 days a week.)

3. Asst. Vice President Carolyn O’Grady .................. office: 507-457-2502
Winona State University Off-Campus Study
Program Incident Report

Winona State University is required to report any emergency incidents that occur during off-campus study (we report to both the State of Minnesota and to the federal government.) Such incidents include injury, theft, sexual harassment/assault, and more. To help us track incidents, please fill out this form as completely as possible. This form will serve as the University’s record of what transpired. Attach extra sheets as necessary and any documentary evidence. Email this information or fax a copy of the document to Study Abroad (studyabroad@winona.edu or fax +1-507-457-5883) as soon as possible. Submit the original report and all supporting materials to Study Abroad within two weeks following the end of the program.

1. Your name: Click or tap here to enter text.
2. Your title or role: Click or tap here to enter text.
3. Date of incident: Click or tap here to enter text.
4. Location of incident: Click or tap here to enter text.
5. Time of incident: Click or tap here to enter text.
6. Were you present: Click or tap here to enter text.
7. Name of participant(s) involved: Click or tap here to enter text.
8. Name(s) of other individuals involved: Click or tap here to enter text.
9. Brief description of what happened: Click or tap here to enter text.
10. If you did not witness the incident, who provided this description (please list all names): Click or tap here to enter text.
11. If you were not present, when and how were you informed? Click or tap here to enter text.
12. What actions did you take: Click or tap here to enter text.
13. If the participant was transported to a hospital or clinic, please provide the name of the facility, its address and phone and fax numbers: Click or tap here to enter text.
14. List the names and phone numbers of physicians who examined or treated the participant. Click or tap here to enter text.
15. List the exact names and prescription numbers of any medications prescribed to the participant. (Please keep all packaging and inserts). Click or tap here to enter text.
16. Was the participant conscious and, in your opinion, capable of making informed judgments about his/her medical treatment? Click or tap here to enter text.
17. If the participant was not capable of making medical decisions, who made any decisions? Click or tap here to enter text.
18. What, if any, follow-up care was recommended? Click or tap here to enter text.
19. Were the police or legal authorities notified of the incident or present at the scene? Click or tap here to enter text.
20. List the names and phone numbers of responsible legal authorities present or involved in the resolution of the incident. Click or tap here to enter text.
21. If the incident occurred outside the U.S., was the embassy notified? Click or tap here to enter text.
22. If so, by whom? Click or tap here to enter text.
23. List the names and phone numbers of consular officials involved in handling this incident: Click or tap here to enter text.
24. List the dates and times of contact with WSU staff: Click or tap here to enter text.
Behavior Contract Sample

[Course Title]
[Date]

Course Expectations

Attitude and Respect
Because we will be spending a great deal of time together, everyone’s enjoyment will depend upon each individual maintaining a positive and respectful attitude toward one another and our hosts (this includes all [host country-ian] people). Disrespect and rudeness will not be tolerated. Significant issues of attitude or disrespect will result in an early departure, for which you will be financially responsible.

Alcohol and Drug Use
Drug use on our trip is not tolerated. Any student who uses, buys, or sells illegal drugs will be expelled from the program and immediately returned home at his/her own expense. One violation will be cause for removal from the program, which also means loss of academic credit.

We expect that if you choose to consume alcohol during your personal time you will do so responsibly. Responsible use of alcohol is when you:

- Abide by the host country laws.
- Do not miss any scheduled event because of the effects of alcohol consumption.
- Do not become ill due to the effects of alcohol consumption.
- Do not engage in inappropriate behavior toward other individuals or property that is the result of alcohol consumption.
- Do not engage in behavior that causes embarrassment to the other members of the group, the faculty member(s) or the in-country host(s) as a result of alcohol consumption.

Violations of Winona State University policy regarding alcohol or illegal drugs, or of the policy established by the program leader of the off-campus course, will be addressed in one or more of the following ways:

A. Restricted or supervised involvement in subsequent activities during the travel period.
B. Dismissal from the program (the violator will travel home at his/her expense).
C. Financial restitution for damaged property.
D. College judicial proceedings upon return to campus.

Safety
Although [host country-ian] people are friendly and very hospitable, crime does happen, and tourists are easy targets. Always travel with at least one other person on the trip. Make sure that someone knows where you are going and when you will be back. Please be extremely careful when out at night and be responsible for each other. Placing yourself at continued risk will result in an early departure, for which you will be financially responsible.

Additional Guidelines

All course scheduled activities are mandatory.

- Stay with the group/look out for one another/take your medications on time. You are not to engage in any behavior that might delay a departure, or risk missing a travel connection. In turn, you are responsible for helping others keep the class on schedule.
• **Maintain a positive attitude and be patient with each other.** At some point each and every person on the trip may feel overtired, too hot, too cold, too dirty, too carsick, or just plain homesick. This is a part of travel and is only natural. Try to bear the complaints of others with grace, and try to minimize your own complaints (unless they are of a medical nature – then inform one of us immediately, no matter how slight of an issue).

• **Be inclusive.** It is natural for some people to form close social circles and others to avoid joining groups. However, we all wish to remain safe and have fun. Be respectful of each other’s relaxation time. Make an effort to include those who wish to be included, make an effort for those who desire privacy (except when this means a risk to safety, such as walking alone).

• **Remember the bigger priorities.** Many things can befall a traveler abroad – not enough clean socks, hair that never dries, a lost camera, a stolen iPod. Your biggest priority is safety and staying with the group. Remember your medicines, your passport, your classmates, and your instructors, and everything else will work out fine.

• **Personal electronic devices/social media.** We realize that for many of you, your only camera is on your phone. During course activities use of your phone, except for taking images, is prohibited. This includes texting, emailing and updating social network status. Rather than looking down at your phone, we want you looking up and taking in the experience. We encourage each of you to consider a technology break during this course, or at least limiting your time commitment to social media.

• **Expect to experience newness.** I know you are as excited as we are to spend [duration] in [host country]. Even though you will enjoy a new culture, people, food, and music, we want you to keep in mind that
  1. You are a visitor in another country.
  2. There are different gender norms in [host country] than in the United States.
  3. In general, the pace of life moves more slowly. Enjoy it.

**Let us help you.** Your first and best means of solving any problem while in [host country] is to speak with one of us. Your privacy is always respected during one-on-one conversations with us, even after we return to the U.S.

I have read the course expectations and fully understand that failure to meet these expectations will result in an early departure, for which I will be financially responsible.

_________________________________________ __________________________
Signature       Date
Title IX and Your Responsibilities
Title IX Overview

• “No person in the United States shall, on the basis of sex, be excluded from participation in, or denied the benefits of, or be subjected to discrimination under any educational program or activity receiving federal aid.”

• Acts of Sexual Misconduct and Harassment, including Sexual Assault are a form of sex discrimination prohibited by Title IX.
So what does this mean?

- If a school becomes aware of sexual harassment, assault, or misconduct, it must take:
  - Immediate and appropriate action to investigate what happened.
  - Prompt and effective steps to end the sexual misconduct and/or harassment, prevent its recurrence, and address its effects.
  - Steps to protect the complainant.

- In addition, the institution must:
  - Make every effort to honor victim/survivor’s wishes.
  - Establish guidelines regarding confidentiality that allow for a balance of privacy ability to get support.
  - Balance honoring survivor/victim’s wishes and mandatory investigation.
Sexual Misconduct

- Non-Consensual Sexual Contact
- Non-Consensual Sexual Intercourse
- Sexual Exploitation (taking non-consensual or abusive sexual advantage of another)

- See [WSU’s sexual violence policy](#)
Sexual Harassment is ...

- Unwelcome sexual advances, requests for sexual favors and other verbal or physical conduct of a sexual nature, and:
  - submission to the conduct is made a clear or implied condition of employment or academic progress and/or decisions;
  - the conduct creates an intimidating, hostile or offensive working or academic environment;
• Can be directed toward person of same or opposite gender.

• Encompasses a lot of things, including:
  • Use of demeaning terms that draw attention to an individual's sex or sexuality;
  • Use of words of a sexual nature describing body parts or sexual acts, telling suggestive jokes or stories, and engaging in unwelcome conversations about sexual exploits or sexual desires;
  • Offensive physical conduct or physical closeness;
  • Displaying sexually suggestive objects, pictures, cartoons, or representations of any action or subject which is sexual in nature and which can be perceived as offensive.

• And more – see the EEOC site: [http://www.eeoc.gov/laws/types/sexual_harassment.cfm](http://www.eeoc.gov/laws/types/sexual_harassment.cfm)
Title IX and Your Reporting Responsibilities

As a Travel Study leader, you have a mandatory reporting obligation. You need to know:

- What Title IX is, and what constitutes sexual misconduct or harassment.
- The WSU Title IX policy.
- Your reporting responsibilities.
- What to say to students who may disclose to you.
Your Reporting Responsibility

• If a student talks to you about an incident they have seen or experienced, you are required by law to report it.

• You do this by contacting WSU Office of Affirmative Action/Equity and Legal Affairs.
  • Contact Lori J. Mikl, Director of Affirmative Action/Equity & Legal Affairs and Title IX Coordinator (lmikl@winona.edu; 507.457.2766)

• You must be able to report the name of the student bringing forth the complaint, details of the incident, the name of the affected student, and the name of the person who is being accused.
What about confidentiality?

- Students who wish to report or discuss sexual misconduct incidents should be made aware that faculty instructors are required to report issues of sexual misconduct to the home campus.

- However, to the extent possible under law, all parties will respect the confidentiality of the sexual assault victim and the alleged offender(s) as much as possible.
• If a student comes to you, you can say things like
  • “I need you to know that if I hear about a safety risk for you or another student, I need to report it back to campus.”
  • “I also need you to know that we will treat the information with sensitivity.”
  • “Most of all, I want to help you with this.”
Good Advice

• Include sexual violence as a topic of safety during your pre-departure orientation. Help students to understand that:
  • They have the right to be safe.
  • If they are a victim of sexual misconduct, they have the right to report the incident, seek medical care, inform the policy, and file a case with WSU Legal Affairs.
  • They can choose one, none, or all of these rights.
  • It is a student’s responsibility to take care of him/herself and be attentive to personal safety, but if a student is assaulted it is NOT THEIR FAULT. No one has the right to assault another.
  • Even if a student has passed out drunk and is raped, that is sexual assault and the student has been the victim of a crime.
Good advice, cont’d.

• As you discuss appropriate alcohol use in the country you will be visiting, remind students that alcohol is the number one date rape drug! They must be careful what and how much they drink, and with whom. It is very easy for someone to put a date rape drug in a drink. Rohypnol is the best known, but it’s not the only one.

• Have a course policy regarding behavior (e.g., no students out at night alone, no drunkenness, etc.). Make sure your policy is clear about consequences.

• Police integrity varies from country to country. If a student wishes to contact the local police, and you are not sure the police will respond appropriately, you can all International Programs & Services to discuss advisability of reporting and decide on procedure.
Supporting Students

- Believe the student. Do not dismiss what you have been told.
- Help students contact sources of support they may need, including family members, campus counselors, religious leaders, medical providers, etc.
Our responsibility to protect students is real and WSU takes it very seriously.

Know your responsibility.

Before the student shares details, let the student know that you will have to share info with WSU because of your legally mandated reporting responsibility.
When in doubt, or for more info...

- Contact Lori J. Mikl, Director of Affirmative Action/Equity & Legal Affairs and Title IX Coordinator (lmikl@winona.edu; 507.457.2766)
- Contact members of the Sexual Violence Advisory Committee: http://www.winona.edu/alluniversitycommittees/sexualviolence.asp
- See other WSU online resources: http://www.winona.edu/sexual-violence/
Helpful Definitions

**Study Away Program**
A credit-bearing course or program sponsored or offered by WSU in which participants travel off-campus in connection with an educational experience. Such activities include, but are not limited to, classroom study, educational tours, research, intern- or externships, community-based learning, or a combination of these. Also known as a study abroad, education abroad, or off-campus study program.

**Third-Party Provider**
An organization that facilitates or administers study away programs either independently or through contractual agreements with WSU.

**Faculty-Led Program**
A specific type of for-credit study away program in which WSU faculty teach a course at an off-campus location and the location is an integral part of the learning experience. Programs are generally less than one semester in duration. Also known at WSU as “Travel Study.”

**Institutional Partner**
A university or organization, usually overseas, with which WSU has signed partnership agreements for the purposes of student exchange and/or student direct enrollment, and visiting faculty/staff opportunities.

**Participants**
Unless otherwise noted, “participants” refers to all individuals taking part in an off-campus program: students, instructors, and any other accompanying adults who have been approved for the program.

**Terra Dotta (TD)** – The online enrollment management system used by the Study Abroad office for program information, student application materials, faculty recommendation forms, and required student and faculty documents.