

Concordia  
University  
Global Education  
Faculty Leader  
Handbook

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# 1. Introduction

## 1.1 Mission Statement

The mission of the Study Abroad Office at Concordia University is to promote faith development, global civic engagement, intercultural sensitivity, and career development among our students by providing access to academically-sound, transformative international experiences.

## 1.2. Study Abroad Office (SAO)

The Study Abroad Office (SAO) is the office of Concordia University that supports all international academic travel, both short-term and long-term for both the Mequon and Ann Arbor campuses.

The SAO is located in the Concordia International Center (CIC) in Katharine Hall on the Mequon campus. The office can be reached at [study.abroad@cuw.edu](mailto:study.abroad@cuw.edu) or 262-243-2020. Student workers staff the front desk from 8:00am-5:00pm Monday through Friday.

### 1.2.1 Staff

**Dr. David Birner-** Executive Director of Concordia International Center (CIC)

Office: Katharine 113

Email: [David.birner@cuw.edu](mailto:David.birner@cuw.edu)

Phone: 262-243-4457

**Maggie Leimkuehler-** Study Abroad Program Coordinator

Office: Katharine 102

Email: [Margaret.leimkuehler@cuw.edu](mailto:Margaret.leimkuehler@cuw.edu)

Phone: 262-243-2132

### 1.2.3 Emergency Line

In the event of an off-hours emergency, please contact Concordia Campus Safety. A Campus Safety Officer will answer 24/7. They will take a report and contact Dr. David Birner or Study Abroad Coordinator [Maggie Leimkuehler], who will be in touch with you as soon as possible.

**Campus Safety: 262-243-4344**

**In the event of a life-threatening emergency, call the local emergency services number in the country you are visiting (likely it's not 911). You can also call the U.S. Department of State Overseas Citizens Services +1 202-501-4444.**

## 2. Responsibilities of the Faculty Leader

Concordia University Faculty Members are encouraged to propose, develop and lead courses that substantively integrate experiential learning in an international setting (“Global Education Courses”). These courses are designed to be academically rigorous, and include intercultural, professional, faith, and service learning outcomes. All faculty who desire to lead a Global Education Course are required to obtain approval from their Dean, not only for the proposed course, but for individual approval of the faculty to be Faculty Leaders. All proposed Global Ed. Courses and destinations are then reviewed for approval by the Study Abroad Faculty Advisory Committee, made up of faculty members from all six schools and both campuses. Upon approval of a course, Faculty Leaders are expected to be the driving force in developing their Global Ed. Course, making travel and logistical arrangements, developing a budget, recruiting and advising potential student travelers, conducting pre-departure and on-site orientations for students, and collecting all necessary information and documents from participants. Faculty Leaders work collaboratively with the SAO through the entire program cycle.

During the travel portion of the course, Faculty Leaders are expected to:

- provide an on-site orientation for students
- set up and monitor travel and living arrangements
- manage the program budget
- facilitate excursions that are safe and enhance learning outcomes
- provide assistance to students in various ways to ensure their personal and academic well-being
- reduce possible risks and represent the University’s interests
- handle conduct problems according to established procedures
- respond appropriately to crisis situations by following the Crisis Management Plan
- maintain contact with the SAO in the event of changes to itinerary or emergencies
- enforce and uphold Concordia’s Code of Student Conduct

Upon return, Faculty Leaders are required to administer and turn in the Program Assessment. Faculty are strongly encouraged to facilitate re-entry programming for students in the form of debriefs or reunions.

**Leading a Global Ed. Course requires faculty to wear many hats. The SAO is here to provide consultation and assistance with any element of these responsibilities.**

### 3. TEACHING SHORT-TERM OFF-CAMPUS COURSES: AN OVERVIEW

*By Dr. William Hoffa\*, written for the NAFSA Guide to Successful Short-Term Programs Abroad*

Teaching a diverse group of students in a foreign setting represents a huge challenge that you will likely find at times to be both time consuming and frustrating. No one should enter this work with the anticipation of accomplishing much scholarly research overseas – which, except in the rarest of circumstances, must be subordinated to prescribed teaching and administrative duties. Many personal and professional satisfactions, however, will come with the successful implementation of the program and the knowledge that the lives of U.S. students have been significantly enriched through the experience. Although you will have to balance a wide variety of responsibilities and roles – teacher, intermediary, adviser, program administrator, and advocate for students – this enlarged faculty role brings with it ample additional rewards and gratifications from students, parents, your faculty counterparts, and your home institution. Faculty members who have directed past programs are almost universal in commenting on the unique professional development and personal rewards of living, traveling, and learning with students far from home, as well as the enhancement of their teaching on campus. In his article, “It’s Like Wearing All the Hats”<sup>1</sup> John C. O’Neal, professor of French and director of the Hamilton College Junior Year in France, provides an insightful account of the demands of directing an overseas program. Professor O’Neal, serving his fourth year as director of the Hamilton program, likens the

overseas experience to being college president and dean and academic adviser and lecturer and psychological counselor and accountant and even, in some cases, repairman. This perceptive article describes these multiple roles as a series of constantly shifting responsibilities for which adequate prior training is likely to be minimal and on-the-spot problem-solving ability, critical. Although some of what O’Neal says applies only to year-long, branch-campus programs, in point of fact, no matter how long or short the overseas experience, leadership demands remain surprisingly congruent whatever the length, location, or curricular focus. As faculty director, you are the curricular architect of the program. Beyond this, you serve as liaison, coordinator, and facilitator among the many different constituencies and components of the program: home campus, students, on-site facilities, host families, the local and national government overseas, and last but not least, the host culture. What any given faculty member does obviously depends largely on the nature and purpose, the design and structure of the particular program she or he is directing. Once overseas, you assume full administrative and academic responsibility for the integrity of the program, as well as personal responsibility for the wellbeing of all students. You are the legal representative of your home institution for the period of the program. You may be asked to contact your home campus at intervals – by whatever means (email, fax, phone) – with program updates, though many on-site decisions are inevitably left to your own judgment. As an administrator, you are responsible for the overall direction of the on-site program. Your on-site administrative responsibilities necessarily begin well before arrival. Housing

assignments, special dietary arrangements, health issues, special needs accommodations – all must be dealt with well in advance of arrival. Above all, you are responsible for the academic quality of the program and must be willing to assure those who need to know that the expectations of both participants and your home campus are being met. Your on-site supervision assures that academic quality comparable with home institution standards is being maintained. This may require extensive and structured student contact. You might schedule frequent one-on-one sessions with students, offer optional times for consultation, or set up optional or mandatory group discussions to process what has been read or seen. The daily schedule of teaching, student advising, and making logistical contacts with host organizations and individuals is likely to be rigorous and demanding. Directing a study abroad program for participants who most likely have limited experience in a new culture provides a range of challenges that go far beyond what might be required at home. Participants will see you as a resource person who can alleviate the initial confusion and disorientation that confronts them as you guide them along the paths of new knowledge and cultural integration. It is very important to understand the variety of motivations that encourage students to study overseas; not all will be as purely academic as faculty would prefer. Indeed, the desire to “get away” from the academic pressures of the home campus may be as fundamental as a student’s desire to test him- or herself in a new and “foreign” environment. Successful teaching and advising must acknowledge this complexity of student hopes and desires, providing counsel that balances the twin academic and experiential bases of international

education. You will need to be skilled in *diplomacy, logistics, and group dynamics*. You will invariably be asked to be a *cultural interpreter* and *analyst*, helping students understand what is going on and how it relates (or doesn’t relate) to things back home. Unless there is someone else on the local scene who really knows the host country’s social, cultural, and academic fabric, you must be prepared to take on the role of explaining it to students. Above all, you must be prepared to be a cheerful and supportive *friend-in-need* to students, not simply an authority figure. Whatever is prescribed and expected, chance and circumstance often rise up to demand yet additional imperatives and responsibilities. Experience shows that the most successful faculty directors are those with the physical stamina to manage long hours and a high level of interaction with students and local contacts, the patience and good humor to deal with frequent frustrations, and the knowledge and independence to function well in a culture not their own. Fundamental to all of the above, you need to be an eager and committed teacher who knows how what you are teaching relates both to the home campus and to the culture of the host country. In sum, you are responsible for providing reasonable access to opportunities for both successful academic and personal experiences. Due to the sensitive nature in acting as both advocate for the students and liaison among the distinct program components, you must exercise caution in personal matters concerning individual students. This is especially true during periods of emotional stress that some students may experience as they undergo cultural shock and learn strategies for adapting to a new cultural setting. Conversations with individual students must be regarded as

confidential. Matters of particular concern are the violation of trust or privacy of students through the unauthorized sharing or disclosure of information; any act that can be interpreted as sexual harassment; or any discriminatory act reflecting prejudice based on sex, age, race, sexual orientation, or religious belief. As faculty director, you are expected to behave as a trustworthy representative of your home institution abroad, and be conscious of what this implies.

Dignity, decorum, tact, and discretion must be the rule in both public behavior and private handling of individual problems. Few faculty would consciously cause problems through careless words or acts, by a misplaced sense of humor, or by a cross remark in pressured situations, but this can sometimes happen under the pressures of the moment. You must work to develop and maintain rapport with the group, but a certain social distance should be maintained as well. The ideal combination is “a heart of gold and a will of iron,” as one past director said, in the face of unreasonable complaints and attempts by students to ignore program regulations. You should work to avoid the perception that you have favorites with the group; do not

reveal a personal dislike for any participant or on-site staff member. Be professional. Your role in the face of any student problems is to work with the student to find a solution, no matter how long it takes. In addressing physical and mental health issues, a rule of thumb is not to assume that problems that persist for more than three days will eventually go away by themselves. Keep on top of the situation from the beginning to prevent escalation and a potential crisis. Finally, if a student expresses a wish to return home, listen carefully and empathetically, offering coping strategies and other suggestions. If the student persists, despite your efforts to help in the adaptation process, let the student make travel plans to leave. Often this serves as enough of an outlet for the student’s frustration and she or he may decide to reconsider things. We hope the preceding paragraphs have not frightened you away from teaching abroad, but have given you a realistic picture of what may happen while abroad. In sum, your home campus provides faculty with an opportunity to work with students from other institutions, and to get to know this generation of students beyond the classroom.

<sup>1</sup>John C. O’Neal “It’s Like Wearing All the Hats” *ACADEME*, Sept/Oct 1995.

Excerpt from **The NAFSA Guide to Successful Short-Term Programs Abroad**, pgs. 174-76 Edited by Sarah E. Spencer and Kathy Tuma Copyright 2002 NAFSA

**\*A note about the author:** William Hoffa has been a member of the faculty at the School for International Training since 1998. As principal consultant of Academic Consultants International, he works with study abroad offices at more than 20 major universities and colleges. He has served as executive director of the Scandinavian Seminar, as field director of University Programs for the Council for International Educational Exchange, and as a professor of English at Vanderbilt University, the University of New Mexico, and Hamilton College. Hoffa is the study abroad advisor at Amherst College and is on the board of the Forum on Education Abroad. A former senior Fulbright lecturer at the University of Jyväskylä, Finland, and an active member of NAFSA, Hoffa is the author of numerous publications in the field of study abroad.

## 4. Proposing a Global Education Course

Whether you are planning your first travel course, or you have planned and led travel courses for many years, the requirements for Faculty Leaders are all the same, and they begin with creating and submitting a program proposal. The Global Education Course Proposal guidelines can be found in **under the Learning Content Section**. The proposal itself can be found on the Study Abroad website under Faculty Resources.

Eligibility: Any faculty member, with the approval of his or her dean and department chair, may propose a Global Education Course.

Proposal Deadline: Courses proposed to run during Winterim are due by November 15<sup>th</sup> of the prior academic year. Courses proposed to run during Spring Break or Summer are due by April 10<sup>th</sup> of the prior calendar year.

Ex. Winterim 2020 applications are due November 15<sup>th</sup>, 2018

Summer 2020 applications are due April 10<sup>th</sup>, 2019

Requirements: Proposals are required to be complete, signed by your Dean, and submitted electronically to Study Abroad Office. Proposals must answer all questions on the standard form, and have attached a copy of the course syllabus and proposed itinerary. If the proposing faculty member has led a Global Ed Course in the previous year, all Program Assessments must be turned in to the SAO for institutional research and statistics purposes. If this critical piece of the Global Ed process is not complete, approval for future courses may be withheld.

Review: Completed proposals are reviewed by the Study Abroad Faculty Advisory Committee. Considerations for approval/denial include safety of the destination, risks posed by the travel plans, satisfactory answers to all questions, course objectives, plans for meeting course objectives, and the syllabus. After review of the proposal, the Faculty Advisory Committee reserves the right to make a final determination contingent upon an interview with the faculty member and/or overseeing dean.

## 5. Program Development

### 5.1 Academic models

Global Ed courses can fall into one of two accepted models of instruction:

1. Overseas only- The entirety of the course contact hours are completed overseas (with some meetings/assignments completed pre-departure and post return).
2. Overseas component embedded in a larger course context taught on home campus during regular term, occurring in the beginning, middle, or end.

## 5.2 Itinerary Planning and Logistics

### 5.2.1 Program Providers

Making arrangements for lodging, transportation, site visits, etc. in-country can consume a lot of a Faculty Leader's time and energy. However, there are various ways to approach this task that can reduce the time commitment involved and still develop a solid, engaging faculty-led program. The approach you choose depends on the quality of in-country contacts you have, the time you can commit to researching lodging choices, local transportation, etc. and the level of in-country support you will require once abroad.

For those that have few in-country contacts and less experience with the local territory and/or language, having the assistance of an organization that specializes in travel to that destination is extremely beneficial. A number of outside organizations, called "Study Abroad Program Providers", specialize in arranging educationally focused group travel. They can assist Faculty Leaders with tasks such as securing group flights, hiring local guides, making housing arrangements, locating classroom space abroad, arranging in-country transportation and setting up excursions and site visits. Program providers generally take on the liability risks associated with the program and are more flexible with regard to payment deadlines. There may be additional costs associated with using a program provider, but depending on the services requested and the number of students involved, the per student cost can be quite reasonable, especially considering the time and effort involved in making some of these arrangements. Because these service providers frequently work with groups, they will likely be able to negotiate lower rates for airfare, hotels, etc.

In addition, arranging programs through a program provider may be the best option for faculty who are new to leading Global Ed Courses. These organization generally provide more pre-departure and in-country support than the standard travel agency, as well as:

- Continual oversight of program details from program inception through completion of the program.
- Detailed, day by day itineraries with contact numbers for local guides, driver, etc.
- Twenty-four hour emergency numbers both for the organization's main office and for in-country staff should an emergency arise.
- Knowledgeable, bilingual in-country guides who can also provide assistance.
- Suggestions for site visits and activities that are off the beaten path but may support the academic objectives of the program.

In addition, these organizations usually provide pre-departure packets for students that include their plane tickets and/or itinerary along with information on tipping, local customs, weather, safety and health, money, etc. They typically provide a more detailed "leader guide" for the Faculty Leaders involved as well.

Standard travel agencies may be able to arrange group flights, secure hotel arrangements and possibly arrange for in-country transportation. However, they are often not capable of arranging everything that a Faculty Leader may need for the program. In this instance, the Faculty Leader takes on more responsibilities for arranging site-visits, local guides, etc.

The SAO has compiled a list of reputable, pre-approved program providers who specialized in educationally focused group travel. These organizations are accustomed to working with Faculty Leaders and students, and are sensitive to education abroad budgets:

#### Academic Program International (API)

- [Apistudyabroad.com/advisors/customized](http://apistudyabroad.com/advisors/customized)
- Argentina, Australia, Brazil, Chile, China, Costa Rica, Croatia, Cuba, Ecuador, England, France, Germany, Guatemala, Hungary, Ireland, Italy, Mexico, New Zealand, Panama, Peru, Poland, Qatar, Scotland, South Africa, Spain, Thailand, and United Arab Emirates.

#### International Studies Abroad (ISA)

- <http://cp.studiesabroad.com/current-programs>
- Argentina, Australia, Belgium, Brazil, Chile, China, Colombia, Costa Rica, Czech Republic, Dominican Republic, England, Fiji, France, Germany, Greece, India, Ireland, Italy, Japan, Jordan, Morocco, New Zealand, Peru, South Africa, South Korea, Spain, Thailand and Turkey.

#### IES Abroad

- <https://www.iesabroad.org/advisors-faculty/customized-programs>
- Argentina, Austria, Australia, Chile, China, Ecuador, England, France, Germany, Ireland, Italy, Japan, Morocco, Netherlands, New Zealand, South Africa, Spain.

Particularly for new Global Ed courses, it is recommended that Faculty Leaders obtain a couple of quotes from different travel operators/program providers in order to compare prices/services. You may also want to conduct a “site visit” prior to taking a group of students to a new place for the first time. Often when working with program providers, they are able to arrange an independent site visit and will cover expenses for lodging. Other travel expenses for site visits cannot be rolled into the student costs for the program, and instead must be approved and paid for by your department. For guidelines on evaluating new programs and site-visit reporting, contact the Coordinator of Study Abroad.

Some departments and/or Faculty Leaders may already enjoy long-standing relationships with host institutions/organizations overseas. In these cases, it may be cheaper and relatively easy to contract directly with the host institution/organization, and when possible have the host institution make all of the in-country logistical arrangements.

## 5.2.2 Independent Travel Arrangements

If you do not go with a program provider for making logistical and programmatic arrangements, the responsibility will fall solely to you, the Faculty Leader. These include arranging airfare, ground transportation, local guides, guest speakers, lodging, meals, excursions and all programmatic details. This route is not recommended for Faculty Leader who are newer to leading Global Ed courses and will work better for Faculty Leaders who have strong experience in and knowledge of the host country, or have operated study abroad programs in the past.

Even for this program design model, it is rare that programs are 100% “do it yourself”. You will likely try to identify a travel agent to at least arrange airfare, and perhaps even lodging, local guides and some group meals. It is best to get quotes from a few travel agents in order to get the best price/services.

Listed here are a few travel agents/tour operators that have been used by Faculty Leaders in the past:

Start the Adventure Travel (STA)

- <http://www.statravel.com/>
- STA offers airfare discounts for educational group travel to a wide variety of locations
- STA includes International Student and International Teacher ID cards that provide discounts at a number of activities, museums, etc.

Operation Europe

- <http://www.operationeurope.co.uk/educational-tours.html>
- Operation Europe has been utilized by numerous Concordia Global Ed courses in the past, and can arrange airfare, ground transportation, lodging, local guides and excursions.

**Before any contracts or agreements can be entered into with any travel agent or outside vendor, they need to be reviewed by the SAO and Concordia’s Risk Management.** If you have a travel agent or tour operator that you have used before that you think should be added to this list, please contact the SAO.

### NOTE:

**Faculty Leaders are responsible for ensuring that they or their travel agent or other in-country partners make arrangements for group flights, airport transfer, lodging, and in-country travel. Students should not be left to their own devices to sort out these details.** Certain circumstances may require a few participants to travel separately (for instance, distance learners or participants who make arrangements for additional travel prior to or upon completion of the Global Ed Course), however these should be the exception to the rule. In these cases, Faculty Leaders are responsible to 1) know the itineraries of students not traveling

with the group, 2) make the SAO aware of these travelers and their plans, and 3) make arrangements for an airport reception.

### 5.2.3 Logistical Arrangements Carry Pedagogical Weight

Regardless of the program model you are working with, it is important to be careful that your course does not morph into a merely tourist-oriented “trip”. Global Ed courses should be unassailably academic, and provide opportunities for substantive cultural interaction and understanding that work towards meeting global citizenship outcomes. Spending a few days in a foreign country does not in-and-of itself guide students in becoming global citizens; it takes intentionality. Each aspect of your program, even logistical ones, carry weight to them, so ask yourself at each step in the planning process, *does this help my students engage in, understand and appreciate the local culture and grow as global citizens?*

Certainly the obvious academic and programmatic components need to address cultural competencies in students, but small choices send a message as well.

For example:

- Using some public transportation vs. exclusively privately chartered buses or vans.
- Spending some time in home stays or university residence halls vs. exclusively staying in foreigner-oriented hotels.
- Planning some meals with locals vs. only group meals.
- Attending cultural festivals/activities vs. only sight-seeing and adventure activities.

### 5.3 Who Can Come?

The primary purpose for Concordia’s Global Ed courses is to provide a unique academic opportunity to Concordia students. However, it has been an accepted practice at Concordia to allow non-student participants to join Global Ed programs, both as a means of community outreach and engagement, and as a way to make travel financially and/or practically viable. It is up to the discretion of the sponsoring department and the SAO to determine whether or not non-students will be allowed to participate in any Global Ed course. Plans to include non-student participants must be disclosed on the Global Ed Course Proposal. The primary consideration of the sponsoring department and the SAO in allowing or disallowing non-student participants is that the presence of non-student participants cannot detract from the overall academic environment for Concordia students. Additionally, non-student participants cannot take up spaces in a program when there are Concordia students ready and able to join the program, *unless there is a programmatic necessity for the non-student to participant to be present* (e.g a nursing program may be required to bring a physician to provide healthcare supervision for nurses as they provide medical care in the host country).

All non-student participants will be required to pay the same amount for their participation in Global Ed Courses as student participants (minus tuition). All non-student participants will be required to be covered under the same insurance as student participants. All non-student participants will be required to abide by the same behavioral standards as student participants. This includes Concordia's prohibition on the possession, use, or sale of alcohol, as well as all other conduct standards. Non-students who fail to comply with Concordia behavioral standards may be dismissed from the program at their own expense.

## Family Members

Faculty Leaders have responsibilities during these programs that go far beyond the typical responsibilities of the classroom, requiring leaders to be available at all time to take care of the needs of their students and respond to emergencies. Therefore, Faculty Leaders are not allowed to bring family members on Global Ed Courses. The following exceptions may apply, at the discretion of the SAO and sponsoring department:

- A spouse or family member is also employed by Concordia and is either participating in the program as a function of their employment, or will serve as an official chaperone (Faculty Assistant)
- A spouse or family member is a student of Concordia, and is taking the course for credit in their degree program (and paying the same fees as student participants)
- A spouse or family member is employed by the partnering organization that is assisting with on-site program arrangements
- If the program is in excess of 14 days long, exceptions can be considered by the SAO

## Minors

It is the position of the SAO and LCMS Risk Management that the participation of children under the age of 18 poses serious liability concerns. Therefore, it is Concordia's policy that children under the age of 18 are not permitted to join Global Ed programs. This includes children of Faculty Leaders, students or non-student participants.

# 6. Finances

## 6.1 Budget Development

In all likelihood you probably developed a skeletal budget before you decided to run the program, in order to determine if the program would be financially viable. The program budget is very important in setting up and running your program. The key piece to remember in budgeting is that your program must be financially self-supporting—this includes supporting faculty travel.

Faculty Leaders are responsible for the setting of a budget, setting up an agency account, collecting student funds, paying for expenses related to the program, keeping receipts of expenses and ensuring that the program account balances at the end of the program. The SAO is more than happy to provide assistance with all aspects of this process.

Remember the importance of making your program affordable for your students! The SAO emphasizes the affordability aspect of any Global Ed course because we want to encourage as many students as possible to take advantage of international opportunities and feel that this goal is best met when Faculty Leaders keep the student's interest foremost in mind when developing program activities and budgets.

For Global Ed courses, salaries are paid to faculty through their departments as if they were teaching on campus, so long as course enrollment meets departmentally defined minimums. Students who register for TS100, or otherwise are not taking the course for credit will not be counted in determining minimum enrollment. Faculty salaries are set as either part of their regular teaching load or as overload by their departments.

Concordia will **not** pay for the Faculty Leader's travel expenses. These need to be taken into account as you identify your program costs. You will need to build these costs into the student costs or negotiate with the travel agent for a free/reduced-cost space. Faculty leaders are permitted to pay their own travel expenses if they choose (as is sometimes the case on more "mission" oriented programs) but this is certainly not expected.

When it comes to meals, you can decide which/how many meals will be included in the cost of the program. It is not uncommon to only budget for a few group meals, and expect students to bring money for purchasing personal meals that are not included in the program (although this should be made absolutely clear to students). For Faculty Leaders, you can build the cost of all your meals into the budget, but this should generally not exceed \$56 per day (The GSE established per diem rate).

When developing your budget you will have both fixed and variable expenses (see Appendix II "Budget Guidelines"). "Fixed" expenses are expenses that will be incurred no matter how many participants join the program. Some of these include:

- Travel and lodging costs for Faculty Leader and any other accompanying faculty
- iNext travel insurance for Faculty Leader and other accompanying faculty
- Rental of classroom space
- Honoraria for guest lecturers

"Variable" costs are those that are dependent on the number of students, and include but are not limited to:

- Student Airfare
- Ground transportation
- Student lodging
- Group meals

- Entry fees for museums or other cultural events
- Tips for drivers/guides
- iNext Student Insurance
- Study Abroad Fee of \$50
- Contingency\*

\*It is beneficial to build into the variable costs a Contingency line item to pay for unforeseen or emergency expenses. The recommended amount for contingency per student is \$75. If these funds are not utilized, they can be returned to students as a refund, or used to enhance the student's experience at the end of the program (e.g. for an added excursion, group meal, or post-return debrief event).

You should develop your budget for a minimum number of students. This will give you your "break-even" point, so you know how many students you need in order to run the program. You may also need to consider a maximum number of students. This is especially important if you have arrangements that are capped in some way (like number of seats on a bus for a tour). This way you know in advance your minimum and maximum enrollments for decision-making during the recruitment process.

Once you have set a budget for your Global Ed course, it is necessary to get departmental approval and approval from the SAO. All budgets must be submitted in a standardized excel format, provided by the SAO.

You will need to reevaluate your budget many times throughout the year. During the application process, you will need to check the number of applications against your minimum and maximum budget numbers and make any necessary adjustments. After the first payment deadline, you may need to make changes to your program based on the number of students that confirm their participation. This could mean anything from canceling planned events due to low enrollment, to adding an extra bus for a tour due to high enrollments. You may also need to make adjustments for any unexpected changes in the program.

Monies involved in Global Ed courses are ultimately the responsibility of your department. This means that if a program incurs an unforeseen loss, the department must cover it. Conversely, if there is a positive balance at the end of a program, these funds should be refunded to the students.

## **6.2 Collection and Administration of Program Funds**

Once you have developed a budget and had your budget approved, the process will switch over from a "development" phase to an "administration" phase. Here are important guidelines to follow in this process.

- I. You will need to establish a university agency account where all monies for the Global Ed course are held, and from which all program-related expenses will be paid. If you're

running a program that has operated in the past, you likely already have an agency account set up. If you need a new agency account set up, contact the Business Office. **It is against Concordia University’s policy for Faculty Leaders or other individuals to pay for large pre-departure program related expenses, such as airfare, travel agent invoices, or lodging on their personal credit card or otherwise from personal funds. These pre-departure expenses should be paid directly from the agency account whenever possible. All exceptions are at the sole discretion of the Business Office.**

- II. Establish a method for tracking student payments. Due to the nature of the agency accounts, it is very difficult to track payments made by individual students if they pay directly into the account through the Cashier’s office, so it is strongly recommended to take checks personally from students, track these payments as they come in (in excel ideally), and hand in checks to the agency account through the Cashier’s office. Only checks made payable to “Concordia University [Wisconsin or Ann Arbor as appropriate]” should be accepted. **Under no circumstances should cash or checks made payable to the Faculty Leader or any other individual be accepted.**
- III. Set a deposit amount, deposit date, and final payment date to be followed by all participants. The minimum deposit amount must be at least \$350 (which includes the Study Abroad Fee of \$50), though you may elect for this amount to be higher. Make these dates and amounts clear to students and the SAO. Also ensure that students are aware that deposits are non-refundable, except in the case of program cancellation. Likely due to travel agents or other vendors you are working with, you will already be given deposit and final payment deadlines that you must comply with. It is strongly recommended to have your deposit date deadline be at least 1 week ahead of any vendor deadline to ensure that you have all necessary funds in your agency account and to allow time for the payment request to be processed.
- IV. To make payments from your agency account, complete a requisition form with the correct account number listed from which to draw from. Detail the payee details (name, address) and purpose of the payment (e.g. “airfare deposit for Italy program”). All major program expenses should be paid in advance in this fashion, including airfare, accommodations, and program provider/tour operator fees. If you are making arrangements for airfare or lodging online where seemingly the only way to make payment is in the form of a credit card, do a little searching. Most vendors have a way for the university to pay by check from the agency account.
- V. Certain program expenses will not be able to be paid in advance, and will need to be paid in cash on-site (e.g. museum tickets, gratuities, certain meals, etc...). In order to pay for these expenses, you have the option to decide whether you would like to cover these personally and be reimbursed, or to take out a cash advance from your agency account. It is always advisable to take out at least the contingency funds in the form of a cash advance to prepare for certain cash-only expenses.

- VI. Keep all receipts for expenses incurred during the trip, and be prepared to show an accounting (in US dollars) of these at the end of the program.**

### **6.3 Note About the Study Abroad Grant**

Addressed on page 23 are details about how students can apply for and receive the grant, however it is important that you know how the grant impacts your financial planning of the trip.

**It is important to give the SAO a roster of all the students who are participating in your program, partly so that we can tell you if or how many of them have been approved for the grant, and in what amount.** Students receiving the grant should be instructed to pay the full cost of the program by the deadline for final payment.

For example, Sue Jones is approved to receive a \$600 grant, and the program cost is \$3,000. She needs to pay \$2,400 by the deadline for full payment. You also have 4 other students each receiving the grant for \$600. This means that your program's total grant allocation is \$3,000. Your agency account will be allowed to go into the negative up to this amount.

Study Abroad Grants are processed as "Financial Aid" for students. This means they will only become accessible during the semester they are allocated for (Winterim during Fall, Spring Break & Summer during Spring). Students may also be able to access other financial aid besides the grant in order to fund their program, but they will still be required to arrange for full payment by the deadline you establish. If you or your students have questions about the grant, or obtaining additional financial aid, please contact the SAO.

## **7. Pre-departure Considerations**

### **7.1 Marketing**

Developing a strong marketing campaign will be key to gaining full enrollment in your Global Ed course. The following are some steps and tips for developing an effective recruitment strategy.

**The main reason that trips get cancelled is due to low enrollment, as a result of poor marketing.**

Steps:

- 1) Step 1: Know your students. There are three basic types of students.
  - a. Type I- The "When do we leave?" students. These students are ready to travel anywhere, any time. They are excited to sign up for study abroad, and have deposit money in hand
  - b. Type II- The "I can be convinced" student. These students may have thought about studying abroad, but may need a little push to make the commitment

- c. Type III- The “I’ve got all I can do to keep up on campus” student. With these types of students, the challenge is to remove obstacles, whether real or perceived, and show that a short-term study abroad is an option for them too.
  - i. First generation or at-risk students. These students have overcome many obstacles just to be in the university. Just being on campus is a major accomplishment for them.
  - ii. First-time travelers. These students have never traveled outside the US, and many not have ever gotten a passport. They may be reluctant or fearful to take the risk.
  - iii. Non-traditional students. These students may have children and full-time jobs. They may barely be keeping their heads above water just meeting all of the responsibilities they have, and studying abroad may not sound even like a remote possibility
  - iv. Double/triple majors. These students have very carefully planned schedules and may have ruled out a full semester abroad for fear that it would jeopardize their ability to graduate on time.
  - v. Students with disabilities. Though there are a number of options for students with disabilities to study abroad for a longer duration, they may be unwilling to take the chance without first having some success abroad for a shorter term experience.

## 2) Step 2: Advising

- a. The need for students to receive advising on Global Ed courses is significantly less than students who plan to study abroad for a semester or year-long program. Students may not even seek out advising before deciding to participate in a Global Ed course. They will rely much more heavily on the strength of written materials, such as promotional material and course descriptions. Because students who opt for a short-term program make these decisions much more casually than semester study abroad students, it makes the need for a careful and thoughtful pre-departure orientation critical to the success of the students.

## 3) Step 3: The Marketing Approach

The first thing you need to do to promote your course is to make your Global Ed course unassailably academic. That is, nothing about the program should seem like a “trip” or vacation. They should be marketed as a valuable part of the curriculum, as an opportunity for the student to continue or enhance his or her studies by going beyond the classroom.

It is important to shape your course in such a way that they will fulfill general and/or major/minor requirements. As much as we wish that students would study abroad purely for the joy of learning, we know that they are much more likely to participate in a program that meets an academic requirement.

As long as the course is unassailably academic and developed with an audience in mind, there is nothing wrong with promoting the more exciting aspects of the

course. The places you can go, the people you can meet, the things you can learn- these are the essence of Global Ed courses and they should be promoted shamelessly. Who wouldn't want to leave Wisconsin or Michigan in January to study ecology in the Caribbean? Why not get theatre majors excited to take a course where they can visit the Old Globe Theatre in London?

While generating excitement is important for recruiting students, you need to be careful not to promise more than you can deliver. Nothing will destroy the reputation of your programs and study abroad in general more quickly than unhappy returning students.

- 4) **Step 4: Informing Students.** There are a variety of means by which promotional information can be disseminated at Concordia. Tapping into these in meaningful ways is key to generating excitement about your trip. There are a number of marketing avenues that the SAO will pursue on your behalf to promote all Global Ed courses. There are a few other, possibly more effective marketing avenue that Faculty Leaders should pursue themselves. There is nothing that creates more excitement around a trip than a Faculty Leader who is excited about their trip!
  - a. Office of Study Abroad will:
    - i. Add the course to the website
    - ii. Create a venue for promotion at the Study Abroad Fair
    - iii. Create printed materials such as fliers and brochures
    - iv. Send Emails
    - v. Follow-up with students who apply for the Grant or otherwise express interest
  - b. The Faculty Leaders can (and should)
    - i. Develop a promotional 1-page course description
    - ii. Tell their students in classes
    - iii. Work with their chair or dean to have other faculty in your discipline area promote the course and hand out promotional information
    - iv. Work with their chair or dean to email students in their major concentration
    - v. Ask your faculty colleagues if you can speak in their classes
    - vi. Hold information sessions that are well promoted

## 7.2 Enrollment Process

Students looking to enroll in a Global Ed Course need to follow a two-step process of enrollment.

**Step 1:** Students registered for Global Ed Courses need to complete the appropriate Program Application, which is located on the Study Abroad website and reviewed and maintained by the SAO. Concordia utilizes this process to ensure that students meet basic eligibility requirements for participation in Global Ed programs. These eligibility requirements are:

- Students must not be on academic or conduct probation at the time they apply.
- Have a minimum GPA of 2.0. Faculty have the ability to set the GPA minimum for their program higher for higher level courses.

The SAO will review applications and issue acceptance/denial letters within 7-10 business days of receipt.

**\*Note— It is vital that students complete the application and receive acceptance prior to registering for the course, in case they don't meet the eligibility criteria.**

**Step 2:** Accepted students should contact the Faculty Leader and make a deposit to reserve their space. It is very important that students contact the Faculty Leader directly to let you know of their interest in your program. Be prepared to tell students any important information they may need to know about the program, and provide next steps (e.g. deposit amounts and deadlines, any other required steps).

Faculty Leaders have the authority to set additional academic criteria for accepting students. A particular course may only be open to students in a certain academic program, or who are at a certain stage in their academic program. Faculty Leaders can also require whatever other application materials for students as they see fit.

**Step 3:** Students who've been accepted by the SAO and gotten the 'OK' to register from the Faculty Leader need register for the course according to the normative procedure for semester course registration.

**Deadlines:**

All student participants must submit their application to the SAO according to the below established deadlines, although you may set your program's deadline earlier:

Program term	Deadline for student applications
January	October 15 <sup>th</sup> of the preceding year
Spring Break	November 1 <sup>st</sup> of the preceding year
May/June	March 1 <sup>st</sup> of the current year

Programs operating outside these standard terms should have students apply with the SAO no later than 75 days prior to departure. You must inform the SAO if you do not want the standard deadline applied to your program.

**7.3 Information Given to Accepted Students**

Once a student's application to study abroad is approved, the SAO will do the following:

- Students will be given an acceptance notice

- Students will be directed to complete Learning Content in their study abroad portal that will cover many policy issues, as well as conduct, travels and safety guidelines
- Students will be given paperwork to fill out and turn in to the Study Abroad Office at least 30 days prior to their travel:
  - Medical Self Disclosure Form
  - Passport copy submittal
  - Emergency Contacts

Faculty Leaders should give the following information to students who register for their course:

- Schedule of payments and amounts
- Country specific information to help prepare for travel abroad:
  - [www.Culturecrossing.net](http://www.Culturecrossing.net) - Country Guides to Culture, Etiquette, Customs & more! This is an online crowd-sourced wiki-style reference so take everything with a grain of salt. Through this site, you can also reach out to internationals you're your host country.
  - [www.Everyculture.com](http://www.Everyculture.com) - an online resource that details each country's language, folklore, religion, common phrases, dress standards and much more
- Information about required immunizations and physical demands of the program
  - <http://wwwnc.cdc.gov/travel/destinations/list>- Centers for Disease Control pages for specific health concerns listed by country. Also listed are the vaccinations required to travel.
- Information about required travel documents (passport, visas, etc...)
  - Give names of locations where required vaccinations can be obtained
  - <http://travel.state.gov/> -Country Information pages, containing specific information about visa requirements, safety concerns, and local laws.
- Date(s) for mandatory faculty-led pre-departure orientation to address destination and program-specific issues

## 7.4 Information and Documents that must be gathered

There are a number of documents that must be completed by students prior to departure.

- Study Abroad Application. Through this, the study abroad office will verify student eligibility to participate in a study abroad experience.
  - Assumption of Risk, Release, and Participation Agreement. This is the chief waiver that must be signed by all participants. Signing this is part of the online application.
  - Emergency Contacts. Students must identify a least one emergency contact on their application.
- Medical Disclosure. On this document, students disclose preexisting medical conditions, medications, allergies and blood type. This information is given to the Faculty Leader to use as a reference in medical emergencies, and is not used to determine if a student can participate in the program.

In addition to information and documents that must be collected from student participants, Faculty Leaders also must provide the SAO with certain information:

- Itinerary. The itinerary provided to the SAO does not need to be an hour-by-hour agenda of activities, but it does need to include information about air and ground travel, and the address and contact information of all overnights.
  - Dates, times and flight numbers for all flights. If there are students who have different flight arrangements from the group, this must be noted.
  - Dates, destinations and description of travel method for major ground travel. This may include information about trains, buses or rented vehicles. This does not need to be exhaustive (i.e. airport transfers, daily city travel).
  - Accommodations. For each location that the group is spending the night, provide the name, address and contact information. If not all students are staying in the same location, information about each student's accommodations needs to be provided.
- Complete participant list. This needs to include all students, non-students and faculty/staff participating in the program. Should include F00#s for all students and staff. If there are any changes to the participant list after it is provided to the SAO, they must be communicated as soon as possible.
- Travel budget and schedule of deposits/payments.
- Contact information for:
  - Faculty Leader in-country. If you will have a phone that will be activated for international use, please provide the number. If you will not have a phone, provide the number that you can be reached at in-country in the event of an emergency.
  - Faculty Leader's emergency contacts back home.
  - In-country contacts. Provide company(s), name(s) and phone number(s) for anyone who might be "hosting" your group or arranging your travel.

## 7.5 Study Abroad Scholarships

Eligibility: Undergraduate students are eligible for one of the study abroad scholarships if they:

- Are at least a sophomore status at the time of the overseas program
- Are not receiving a tuition waiver for being a Concordia employee or dependent of an employee
- Meet a minimum GPA, and are academically in good standing
- Are in good standing with Student Life and the Cashier's Office
- Are taking the course for at least 3 credits (no TS100s or audits)
- Complete the online Study Abroad Scholarship application by the published deadline

Review:

Through the Study Abroad Scholarship Application, the SAO will verify all of the above eligibility requirements. If students do not meet the eligibility requirements or does not complete the application by the deadline, then they will not receive Scholarship funds.

**Awards:**

The Scholarship comes from a limited pool of University funds, so awards may vary year to year depending on the number of recipients.

**Disbursement:**

For Global Ed courses, the Faculty Leaders will provide a full participant list for their program. The SAO will verify which students have been awarded the Grant, and in what amount. The disbursement of Grant funds will be scheduled for the term in which the program credits appear on a student's transcript (Fall for Winterim programs, Spring for Spring Break and Summer programs). The funds will be processed as financial aid, and will be awarded to the student's CU account.

## **7.6 Insurance**

All students participating in Global Ed courses will be automatically enrolled in iNext Enhanced Comprehensive Sickness and Accident insurance by the Study Abroad Office. This insurance covers medical treatment, evacuation, and repatriation of remains, as well as other travel benefits, such as lost baggage or trip delay. iNext insurance costs \$50 per trip for students. For a full breakdown of coverage and how to make claims, see Appendix III.

**iNext Enhanced Comprehensive Sickness and Accident insurance does not cover trip cancelation coverage.** However, iNext does offer a trip cancelation upgrade for \$3,000 of coverage for \$99 per insured person. Faculty Leaders have the authority to require that all students purchase trip cancelation insurance if they choose. If you do not choose to make trip cancelation obligatory, students can individually upgrade their plan to cover trip cancelation at their own discretion. **Students should be made aware of this option.**

Faculty and staff participating in travel courses are themselves required to have an iNext Enhanced Comprehensive insurance policy for the duration of the program. The cost of this insurance is covered by the amount students pay for their insurance. Faculty leaders will be automatically registered for coverage.

The SAO will register all participants for iNext insurance 30 days prior to travel. In order to do this, you must provide the SAO with a full roster of program participants including all Faculty Leaders, with legal first and last name, date of birth, email, and desired dates of coverage. The cost of the insurance will then be billed to the program's agency account by the SAO. ID cards will be emailed or mailed out no later than 10 business days after registration.

There are no networks to be mindful of, so it is not necessary for insurance purposes to go to specific providers. Services rendered out of medical necessity by any licensed healthcare provider are covered. Due to this fact, coverage works strictly on a reimbursement basis, which is one reason it is important to have a “contingency” fund built into your program’s budget so that you are able to pay for services. Instructions for filing a claim are located in Appendix III.

## **7.7 Orientation Sessions**

Providing a quality pre-departure orientation is especially critical for short-term travel programs not only to address logistical, health and safety issues, but also to properly frame the experience for students to get the most out of the experience culturally, academically and spiritually.

Your orientation should address such subjects as academics, itinerary overview, passport, visa and required travel documents (Note: Your program participants may include both U.S. citizens and non-U.S. citizens. Non-U.S. citizens may be required to apply for visas in cases where U.S. citizens do not need visas for entry into foreign countries and vice versa.), immunizations, travel risks, and emergency contingency plans. Personal safety issues should receive particular attention, because customary practices in the U.S. (ex. carrying “Mace” for protection) may be inappropriate or illegal in many countries. Your participation in this session will also provide the opportunity to talk about your expectations for the program and student behavior and disciplinary measures while on the trip. In addition to the formal pre-departure meeting, you can host as many informal or preparatory meetings as you wish with the students.

## **8. Overseas Responsibilities**

### **8.1 Upon Arrival**

As soon as possible after arrival:

- Provide/Confirm Study Abroad office with your 24/7 emergency contact number.
- Contact the Study Abroad office by email to inform us of the student’s arrival. Worried parents/friends/family members usually call the SAO first to find out if students have arrived safely. Encourage students to call/email home as well.
- In the event that portions of your program have changed, provide the SAO with an updated itinerary and confirm telephone numbers where you can be reached at all study sites visited.

Once the group has arrived safely, try to allow some time for students to rest. Planning too much into the first day of arrival can be overwhelming. However, having some materials prepared for your students upon arrive can be very helpful. Try to have a welcome packet for students upon arrival that includes:

- A welcome letter
- Program obligations such as times and places of important first program meetings
- A map of the area they will be staying (with pharmacy, ATM, police station, public transport stops, and food shops clearly marked)
- Directions to and from the housing location to the site of your general orientation meeting
- Information on how to call home

## 8.2 On-Site Orientation

The on-site orientation is one of the most important moments of your Global Ed course. It sets the tone of the program, and is truly the best opportunity to address practical and cultural issues that students are about to face. Being on-site will make the experience finally “real”, which will help students to put information presented into a real-world context, and make them more likely to engage and retain information. In addition to academic, cultural and programmatic details be sure to cover practical matters as well:

- Emergency response plan and procedure for emergency, including meeting place/communication.
- Remind students they must adhere to local laws, Concordia’s Code of Student Conduct and the Concordia prohibition on alcohol use. Be sure to inform students that they are subject to laws that differ from home. If possible, you might request a local expert like a law enforcement officer to assist.
- Remind students you are there to help with any issues (cultural adjustment, grievance complaints for harassment/discrimination, reporting of assault/rape, etc.)
- Provide students with site-specific information about potential health and safety dangers. Examples include, but are not limited to: drinking water safety, taxis use, areas of town to avoid, pick-pockets, swimming safety/lifeguards, poisonous insects/snakes, appropriate dress, gender norms, etc.
- Provide students with in-country emergency contact information: nearest doctor, equivalent of 911, and U.S. Embassy/Consulate.

A walking tour of the area where you are staying is always useful and appreciated by students. Try to point out:

- Public transportation stops
- ATMs
- A nearby grocery store
- A pharmacy
- The post office
- Historical sites

- Parks

## 8.3 Setting up Communications

### 8.3.1 Faculty Leader Telephone

In order to have a readily available means of communication, the SAO recommends that you consider leasing or purchasing a cell phone overseas, especially in countries where telephone access could be difficult in an emergency. (A reasonably priced cell phone purchased in the U.S. typically does not always work overseas, or vice versa, unless you have a triband phone with a replaceable SIM card.) The cost should be factored into the program budget.

### 8.3.2 Free Messaging Apps

Especially for programs where students and the Faculty Leader may not be staying in the same place, or for programs that allow any significant student “free time” or autonomy, it is recommended to set up a way for the group to communicate. Since it is unlikely that every student will have access to cell service while abroad, this should not be relied upon. Instead, your group can utilize one of the many free calling and messaging services that are available on most smartphones. These allow access to text and audio messaging while connected to Wi-Fi, which is abundantly available in Europe and other well-developed parts of the world in hotels, cafes and restaurants.

Some of these apps are **WhatsApp**, **Viber**, and **WeChat**. Choose one of these (or another comparable service) that the whole group will download and exchange contacts on. Using these is particularly useful as well for staying in touch with friends and family back home if they also have the app.

## 8.4 On-Site Program Management

As a Faculty Leader, you will find that your responsibilities do not end in the classroom. Besides leading excursions and other experiential learning activities, students will rely on you for all kinds of extra-curricular assistance as they adjust to a new and sometimes stressful environment. Be prepared to make yourself available to students who may be in need of practical or emotional help during the program; addressing these is part of your role. If you need assistance, especially related to student services on site, please contact the SAO.

### 8.4.1 Student Conduct

We recognize that the students participating in Concordia programs are legally adults and responsible for their own behavior. (NOTE: students under 18 are NOT permitted to participate in Concordia Global Ed courses). However, they are also considered to represent, fairly or not, their home institution and country. It is your responsibility to correct students when they are offending the norms of the host country. Part of the pre-departure AND on-site orientation for your course should include discussion of those norms and typical ways in which foreigners may unknowingly violate them. Students need to be aware that they are subject both to the host country laws, to the Concordia Code of Student Conduct and to Study Abroad policies and guidelines outlined in the Pre-Departure Student Handbook Study Abroad (available on the Study Abroad website under Student Resources).

In the case of a serious violation which jeopardizes the safety or well-being of the offender, other students, or members of the host culture (i.e., instructors, home stay families), students should understand that such behavior may result in dismissal from the program without refund, failure of courses, and/or an early return home at the student's expense.

It is highly recommended that you consult with the Study Abroad office in any case of student conduct, to ensure that proper procedures are followed. It is required that prior to dismissing a student from the program, you consult with the Study Abroad office, with the only exception being in extreme circumstances. Each situation and program is different, but the SAO can often provide you guidance based on our past experience and University policies. Additionally, we can assist with solutions to certain situations, such as a behavioral agreement. We also consult regularly with other offices on campus, such as Legal Affairs, Risk Management, the Division of Student Life, Counseling Center, etc. in such cases to ensure that the proper steps are taken for the safety and wellbeing of the student, the program staff, and the University.

**A note about alcohol:** Many Global Ed courses travel to locations where alcohol is consumed in a more social manner than in the U.S. Regardless, Global Education Courses are considered an extension of the Concordia campus, and as such, the use, possession, or distribution of alcohol is strictly prohibited in accordance with the Concordia Code of Student Conduct. Students should be reminded of this policy, and Faculty Leaders are expected to enforce it. Any student violations of the alcohol policy need to be addressed. Faculty Leaders should tell students that their actions are unacceptable, and that their case will be referred to the Division of Student Life's conduct process. Faculty leaders should report such violations to the SAO, who will consult with Student Life. If violations continue, Faculty Leaders should contact the SAO to discuss whether or not a student should be dismissed from the program at their own expense. Reported incidents will be processed through Student Life upon return.

#### **8.4.2 Faculty Leader Conduct**

Just as students must abide by Concordia conduct rules and Study Abroad policies and guidelines while on the program, you and any other Concordia faculty/staff must adhere to Concordia policies as well. Grievances can be filed by students against Faculty Leaders or other program staff for inappropriate conduct.

Unacceptable conduct can lead to demotion, suspension, or dismissal for any Concordia personnel. Some, but not all, of the possible examples of unacceptable conduct are:

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

**A note about alcohol:** Faculty Leaders are expected to not consume alcohol during the duration of Global Education Courses. The reason for this is that 1) These programs are considered an extension of the Campus and 2) Faculty Leaders, even during “downtime” need to be “on” 24/7 to respond to student issues and emergencies.

### **8.4.3 Sexual Harassment**

As the Faculty Leader, you will most likely have to initially manage any sexual harassment complaints that happen on site, unless the complaint is against you. It is your responsibility to ensure that appropriate steps are taken to procure the immediate safety of the student and take corrective action for the student's long-term safety. This may require the dismissal of vendors or on-site faculty from Concordia contract and/or the dismissal of any offending students from the program. Faculty Leaders should be careful to avoid any behavior which could be misinterpreted as inappropriate between professor and student. All students and program staff are required to adhere to the Concordia policy on sexual harassment as found on the Concordia website: <https://www.cuw.edu/academics/compliance/consumer-info/assets/IX%20-%20University%20Policy.pdf>

Any sexual harassment complaints should be reported back to campus immediately by contacting Campus Safety, and all steps mandated by Title IX will need to be followed.

### **8.4.4 Mental Health**

Stress is the number one cause of exacerbation of a pre-existing mental illness, and adjusting to another culture typically involves stress for any program participant. It is important for you to be familiar with the warning signs of mental illness/stress, to identify the condition, and to seek help for the student as early as possible.

Behavioral warning signs include, but are not limited to, an inability to communicate clearly, an unusual or markedly changed pattern of interaction (such as totally avoiding participation, becoming excessively anxious when called upon, or dominating discussions when this was previously not the case), extreme behavior fluctuation within a relatively short time span, a depressed or lethargic mood, being excessively active and talkative (very rapid speech), swollen or red eyes, a marked change in personal dress and hygiene, being sweaty (when the room is not hot), or falling asleep inappropriately.

Even if unusual behavior is due to mere transient “culture shock”, it is important to follow up with the student and offer support. Students are required to disclose if they are actively receiving treatment for mental illness, and if so, obtain clearance from their care provider that they are competent to participate within 30 days prior to departure. For any student, circumstances may arise where they need to seek treatment in-country in the midst of a mental health episode. You should, if at all possible, become familiar with host country laws about involuntary hospitalization, as well as the general cultural attitudes regarding mental illness.

If a problem does arise, you should not attempt to make serious decisions alone, but should seek assistance by contacting the SAO. Additionally, the Dean of Students and Counseling Center are excellent resources that are available to staff and students and can help coordinate a plan of action.

**As outlined in the Study Abroad Crisis Management Plan (referenced in section 9), the proper course of reporting emergencies back to campus is to call Campus Safety (available 24/7), who will take a report and forward on to the SAO.**

#### **8.4.5 Incident Documentation**

Sometime during your program, something may happen involving a student that you did not expect, such as a robbery, broken arm, lost passport, etc. When things like this occur, it is important to notify the SAO immediately and document the incident properly.

By notifying the SAO, we can help you in a few ways. First, we can help by speaking with worried family members. The SAO is usually the first call made by worried parents/friends/family in order to find out what happened to a student. Often, the student contacts home to tell loved ones about an incident or will post something on social media, which in turn brings a call to the SAO with additional questions. We have had callers that will attempt to track down the Faculty Leader overseas in order to get information about their loved one. The SAO can help keep many of these phone calls from reaching you abroad if we are updated on an incident and can answer the questions of worried loved ones.

Additionally, depending on the incident, the involvement of other University offices may be necessary. One example is a student who has disregarded the Code of Student Conduct in some way. In this case, it may be necessary to coordinate with the Dean of Students Office to arrange

for a proper due process hearing. By notifying the SAO, we can coordinate any necessary communication or paperwork with these other University offices.

Not only is it important to notify the SAO of an incident, but it is also important to document the incident properly so that you have a record of the events that occurred. By submitting documentation to the SAO, you are ensuring an official report of the incident exists that can be used for later reference, if necessary. Not only is this a protection measure for the SAO and the University, but more importantly it is a protection measure for you and your department. Without a written report of the details of the incident, in a lawsuit, the only reference you will have is your memory. Additionally, the University will have no written record to use in your defense.

While none of us likes to consider the possibility of a court case, legal action is increasingly likely in the aftermath of a serious incident or emergency. Litigation cannot be prevented, but the effects of litigation can be lessened if you demonstrate that you have been reasonable and prudent. Documentation of an incident can often serve as evidence of reasonableness and prudence.

In Appendix IV you will find an Incident Documentation Form. This form must be submitted to the SAO for any incident that occurs overseas that requires a paper trail. If you are unsure if the incident should be documented, it is best to be safe and document it. This form should be submitted to SAO immediately or as soon after the incident as possible via email. Be sure to include all the information listed on the Incident Documentation Form in your email.

## **9. Crisis Management**

The SAO maintains and distributes an extensive Crisis Management Handbook for Faculty Leaders to follow in the event of an emergency. You will receive a copy of this once your trip is approved, and you will be required to meet with the SAO prior to departure to ensure you understand proper procedures for responding in a crisis situation. A sample of scenarios addressed in the Crisis Management Handbook include death of a student, kidnapping, sexual assault, mental illness, student conduct, serious injury or illness, natural disasters and acts of terrorism.

**It is critical to the safety of students and the University that you follow the actions outlined in the plan in the event of an emergency.**

## **10. Post Return and Follow-up**

Once your program has ended and all your students are safely returned home, it is good to do some follow-up and debrief to help students apply the lessons they learned overseas to their life at home and make a successful re-adjustment.

### **10.1 Tying up loose ends**

Upon safe return to the US, please notify the SAO that everyone has made it back safely. Please notify us of any incidents or interruptions to travel that may have occurred. Also if any student is returning ill and in need of follow-up medical care in the US, please let us know.

Once you notify us of return, we will activate the release of grant funds to the program account (if any).

Please make sure than any outstanding balances related to the trip are paid. Complete a reimbursement/cash advance accounting with receipts for expenses incurred during the program.

Be sure to turn in final grades according to the standards set by your department.

## **10.2 Assessment**

All student participants in Global Ed Courses need to complete an assessment that evaluates programmatic elements as well as Global Citizenship outcomes. This is in addition to the evaluations that are normative in all University courses. The Study Abroad Office in conjunction with the IRB develops, maintains and reviews these evaluations. These assessments are **vital** in order to measure program effectiveness so that Concordia is able to continually develop programs that are appropriate to its mission.

It is the Faculty Leader's responsibility to administer it and ensure 100% response rate. Faculty Leaders who fail to administer this evaluation will not be approved to operate Global Ed programs in the future.

## Appendix I

# Global Education Course Proposal Guidelines

- Course(s) offered abroad must be applicable to the host country/region.
- Course proposals for countries with current U.S. Department of State Travel Warnings will not be considered. *Some exceptions may apply.*
- The academic department(s) and Deans(s) are responsible for reviewing the proposed program including course subject matter and instructional delivery methods prior to submission.
- Global Ed. courses offered abroad must be of comparable academic rigor to those offered on campus. The number of credits associated with the course(s) should be based on the number of contact hours (minimum 15 contact hours per credit).
- Contact hours may include classroom time, lectures, field trips/excursions, group learning activities, research, service learning, community projects, volunteer time, other academic activities, and cultural activities conducted prior to, during, and/or after the in-country program dates.
- A program will typically have one primary Faculty Leader. If the program is associated with two or more discrete courses a second Faculty Leader may be considered. The second Faculty Leader will have equal teaching duties, receive a full salary, and their program expenses should be budgeted into the per student program cost. If the program is associated with one course but there is a desire for two Faculty Leaders, departmentally-defined enrollment minimums must be met.
- If the program recruits sufficient students, a second faculty member or staff member may accompany the Faculty Leader in a supportive role as a Faculty Assistant. Typically this number is 15-20 participants but depends on the individual program budget. The sponsoring Dean will have discretion about the participation of Faculty Assistants.
- Faculty Leaders submitting a Global Ed Course Proposal are committing to the program. However, to ensure continuity of the program if for some reason the primary Faculty Leader is for reasons outside their control unable to participate prior to departure, a Faculty Leader Alternate needs to be identified, and approved by the program chair and school Dean.

## Application Instructions

### **Proposal deadline for programs to run during Summer 2019: NOVEMBER 15, 2018**

A complete program proposal must include the following:

- Global Education Course Proposal Application (please complete electronically)
- Course syllabi for all courses being taught on the program that includes a tentative program schedule including anticipated topics, assignments, and learning activities for the course(s) prior to, during, and after the program.
- Signatures of faculty leader(s), alternate faculty leader, department chair(s), and school dean(s)

Complete proposals should be submitted to the [Study Abroad Program Coordinator](#) via email.

## Appendix II Budgeting Guide

### A. Fixed Costs

- Rental of Classrooms
- Faculty Leader's Travel (airfare, local ground transportation, parking, etc.)
- Faculty Leader's Per Diem expenses (indicate basis of deriving the daily rate, should not exceed GSE per diem rate for meals- \$56)
- Cost of any vehicle rentals (e.g., minibuses)
- Internationally active cell phone
- Miscellaneous supplies (paper, Xerox, etc.)
- Guest Lecturer Honoraria
- Tour Guides

**TOTAL FIXED COSTS**

**\$xxx**

### B. Variable Costs

- Administration costs (\$150 per student if the program is less than three weeks in length or \$175 if the program is three weeks or more)
- International Airfare
- Ground transportation (trains, taxis, etc.)
- Room rental in dorms or hostel (indicate basis of cost)
- Cost of meals (indicate basis of cost)
- Books and other educational materials
- Tickets to museums and cultural events
- Insurance
- Contingency

**TOTAL VARIABLE COSTS**

**\$xxx**

Hint One: you may wish to collect only some of the above costs as part of the program expense and ask students to bring sufficient money to cover other costs—e.g., bus fares and tickets to cultural events—out-of-pocket. That will simplify accounting.

Hint Two: figure the cost per student, and then multiply the total by the number of students.

**TOTAL PROGRAM COSTS =**

Fixed Costs + Variable Costs = **\$xxx**

**COST PER PARTICIPANT =**

Fixed Costs + Variable Costs = **\$xxx**  
Number of Participants

## Appendix III

### Comprehensive Ultimate Plan

Trip Delay.....	\$150/Day up to \$600
Trip Delay due to Quarantine.....	\$250/Day up to \$2,500
Medical Expense/Emergency Assistance:	
Accident Expense .....	up to \$500,000
Emergency Dental due to Accident .....	up to \$750
Sickness Expense.....	up to \$500,000
Mental Health Benefits.....	up to \$500,000
Deductible .....	\$0
Emergency Evacuation and Repatriation .....	up to \$1,000,000
Repatriation of Remains .....	up to \$50,000
24-Hour Assistance Services.....	Included
Baggage/Personal Effects .....	up to \$2,000
Maximum Benefit per Article .....	up to \$250
Combined Maximum for jewelry, furs, watches, personal computers, camera.....	up to \$500
Baggage Delay .....	up to \$200
Accidental Death & Dismemberment.....	\$20,000
AD&D (Air Only).....	\$100,000 / \$1mm Aggregate

► **WHO IS ELIGIBLE TO PURCHASE AN INEXT ENHANCED COMPREHENSIVE TRAVEL INSURANCE PLAN?**

Any individual 13 years of age and older who is currently residing in the United States may obtain an iNext travel insurance card

► **WHAT IS COMPREHENSIVE TRAVEL INSURANCE COVERAGE AND HOW DOES IT WORK?**

The iNext Comprehensive Plans are fulfilled through Nationwide Mutual Insurance Company with assistance services provided by Europ Assistance USA and Inter-Hannover. These policies are appropriate for travelers who may not have primary insurance or a primary insurance policy with limited or no coverage overseas, and where they represent the best value for shorter duration trips due to their daily (10 day minimum purchase) and monthly rates.

Like all travel insurance policies, the coverage provided by iNext is secondary to any other coverage that you may have. In other words, if you are covered by another insurance policy — whether personal, family, or through your university, school or workplace — then that policy is your primary policy. Prior to departure, you should contact your primary insurance carrier concerning coverage to determine what benefits or limitations there are for medical treatment overseas.

► **IMPORTANT:** While abroad, you should have your primary insurance carrier and policy information readily available. During the claims process with Seven Corners, you will be asked to provide the following: Name, address, and phone number of primary insurance provider Policy ID #, Member #, Group # of primary insurance policy

► **WHO IS THE PROVIDER OF THE INEXT ENHANCED COMPREHENSIVE TRAVEL INSURANCE PLANS?**

The iNext Enhanced Comprehensive International Insurance Plans are provided under the group sickness, accident, and travel insurance plan maintained by [CIEE: The Council on International Educational Exchange](#). The iNext Enhanced Comprehensive plans are underwritten by the Nationwide Mutual Insurance Company, an A+ AM Best rated company and administered by Seven Corners.

► **WHERE IN THE WORLD AM I COVERED UNDER MY INEXT TRAVEL INSURANCE PLAN?**

Your insurance coverage is valid in any country outside of the 50 United States and District of Columbia as well as outside one's Home Country. *Home Country* shall mean the country where you have your true, fixed and permanent home and principal establishment.

► **WHAT ARE THE POLICY EXCLUSIONS?**

iNext comprehensive policies do not include coverage for the following:

- *Pre-existing conditions:* Any condition identified or treated within the 60 day period preceding your insurance effective date.
- *Routine physicals and Routine dental examinations and cleanings*
- *Preventive medicine*
- *Injuries sustained by the following activities: Participating in professional sports; skydiving; hang-gliding; parachuting; mountaineering where ropes or guides are used; any race (on an animal or in a vehicle); bungee cord jumping; motorized speed contests, (Speed contest shall not include any of the regatta races); scuba diving without PADI, NAUI certification; spelunking or caving; heli-skiing; extreme skiing/snowboarding*

A complete list of exclusions can be found in the policy description.

► **IS PRE-APPROVAL REQUIRED BEFORE RECEIVING MEDICAL TREATMENT?**

No, however, you are strongly encouraged to contact Seven Corners at 1-877-852-6767 if you are hospitalized, require surgery or being treated for a serious medical condition. Treatment by any licensed doctor or medical facility should be covered if your primary insurance does not cover the treatment. You should simply go to any doctor of your choice, obtain any prescription medication needed, pay the doctor, and then submit a claim for reimbursement. The customary procedure is thus to pay first and then submit a claim for reimbursement. In certain covered emergency situations, Seven Corners can issue a guarantee of payment for up to \$5,000 to facilitate cashless access.

► **CAN DIRECT PAYMENT TO A DOCTOR OR HEALTH CARE FACILITY BE ARRANGED?**

Some medical providers will accept payments from insurance and as noted above, in certain covered emergency situations, Seven Corners can issue a guarantee of payment for up to \$5,000 for a covered emergency. Standard procedure with travel insurance is for you to simply go to any licensed doctor of your choice, obtain any prescription medication needed, pay the doctor, and then submit a claim for reimbursement. You must contact Seven Corners before being admitted to a hospital for scheduled surgery unless it is a medical emergency and a call is not possible. The Seven Corners emergency response team is available 24/7 and may be able to arrange direct payment with the hospital or coordinate payment guarantees to facilitate cashless access for serious and expensive medical cases. Please understand that direct payment is not always guaranteed as each claim is handled on a case-by-case basis.

Seven Corners:

- +1.317-582-2684 (collect/outside U.S.)
- 1-877-852-6767 (toll free inside the U.S)

#### ► WHAT IS INCLUDED IN MY EVACUATION UPGRADE COVERAGE?

In the event of a Natural Disaster Situation, Inter-Hannover will, on a best-effort basis, arrange for your evacuation from a safe departure point they designate to a safe haven of their selection. They will pay for your evacuation up to and including seven (7) days from the date of the official disaster declaration issued by the relevant host country. They will assist with and pay for ground, water and/or air transportation, as may be warranted, to a safe haven. If evacuation becomes impractical due to hostile or dangerous conditions, they will maintain contact with you and advise until evacuation becomes viable or the natural disaster situation has passed.

In the event of a threatening security or political emergency situation due to governmental or social upheaval at your location, Inter-Hannover will arrange (and pay for in accordance with the terms set) for your evacuation from the area. Evacuation services are provided by Northcott Global Solutions security personnel to the nearest safe location and then to your Resident Country if deemed necessary. The decision to evacuate will be made by security personnel in consultation with local governments and security analysts and in accordance with the definition of Emergency Political Repatriation outlined in the policy. Inter-Hannover and Northcott Global Solutions may use any or all appropriate resources to evacuate you, including but not limited to charter aircraft and ground and sea transportation in such circumstances where the point of departure may not be an international airport.

#### ► WHAT DOES MY TRIP CANCELLATION AND INTERRUPTION UPGRADE COVER?

You will be reimbursed, up to the limit on the schedule of benefits, for non-refundable cancellation charges imposed by your travel supplier or airfare cancellation charges for flights arranged for your trip if you are prevented from taking your trip for the following covered reasons:

- Sickness, accidental injury or death of the insured, traveling companion, or family member which results in medically imposed restrictions as certified by a physician
- Weather which causes complete cessation of services of the Common Carrier for at least 24 consecutive hours and prevents the insured from reaching their destination
- Strike that causes complete cessation of services for at least 24 consecutive hours
- An accident or situation in a country which is part of the trip which leads the United States government to issue a general recommendation that an insured should not travel within that country for a period that would include the trip (State Dept. Warnings)

You will also receive an additional benefit of \$100,000 for air-only accidental death and dismemberment coverage

## CLAIMS AND FINANCES

#### ► HOW DO I FILE A CLAIM?

You can easily file a claim with Seven Corners by mail, fax, or email. To obtain a claim form, see below to download the appropriate claim form:

For medical claims go here: <https://www.inext.com/downloads/medicalClaim.pdf>

For Loss of baggage and personal effects claims click here: <https://www.inext.com/downloads/baggageClaim.pdf>

For trip cancellation and interruption claims click here: <https://www.inext.com/downloads/tripCancellation.pdf>

You should have the following information available to file a claim:

- Program Reference Number (listed on the back of the iNext Travel Card or print out) for Comprehensive and Comprehensive Plus plans.
- What coverage type or benefit category the claim is under (e.g. Medical Expense, Baggage Loss, etc.)
- The date the covered treatment or loss occurred
- The amount that was paid (if applicable)

You should complete the claim form for accuracy, sign the form, and return it to Seven Corners along with any requested supporting documentation, such as original receipts, diagnosis, proof of travel (e.g., a copy of a flight itinerary), and primary insurance information.

It is important to remember to keep your receipts from doctor's visits, pharmacy prescriptions and diagnosis records. These will be required by Seven Corners when you file a claim. All diagnosis forms should be translated into English if possible. One reason claims processing can be prolonged is due to lack of documentation. The better prepared you are, the faster the claims processing can occur.

Completed claims forms must be completed and sent with the original itemized bills to the claim administrator within 90 days. Submit Claims or Inquires to:

#### ► CONTACT INFORMATION

Seven Corners, Inc. 303 Congressional Boulevard Carmel, IN 46032

Fax: +1.317.575.2256 Email: [claims@sevencorners.com](mailto:claims@sevencorners.com)

If you have any questions about a claim, please feel free to contact Seven Corners at:  
1-877-852-6767

#### ► WHO DO I CALL FOR HELP IN THE EVENT OF AN EMERGENCY?

Seven Corners is available 24/7 to assist. Contact them at:

- +1.317-582-2684 (collect/outside U.S.)
- 1-877-852-6767 (toll free inside the U.S.)

## Appendix IV Incident Response Log

Should an emergency arise involving Concordia University students, faculty and/or staff, gather the following information and record it as completely and accurately as possible on this form. This information should be communicated immediately to: **Concordia Study Abroad Office. Please submit via email.**

Maggie Leimkuehler  
Study Abroad Program Coordinator  
Work: 262-243-2132  
[Margaret.leimkuehler@cuw.edu](mailto:Margaret.leimkuehler@cuw.edu)  
Cell: 419-819-6553

David Birner  
Executive Director of Global Engagement  
Work: 262-243-4457  
[David.birner@cuw.edu](mailto:David.birner@cuw.edu)  
Cell: 314-740-1418

### Campus Safety: 262-243-4344

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Names of those involved: \_\_\_\_\_

When incident took place: \_\_\_\_\_

Where incident took place: \_\_\_\_\_

Description of incident:

Date: \_\_\_\_\_ Time: \_\_\_\_\_ Spoke with: \_\_\_\_\_

Action Taken:

Date: \_\_\_\_\_ Time: \_\_\_\_\_ Spoke with: \_\_\_\_\_

Action Taken:

Date: \_\_\_\_\_ Time: \_\_\_\_\_ Spoke with: \_\_\_\_\_

Action Taken: