West Chester University of Pennsylvania

Designing and Leading International Study Programs: Risk Management and Best Practices for WCU Faculty

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West Chester University of Pennsylvania

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An Overview of This Guide

West Chester University (WCU) is privileged to have a faculty that is engaged with global teaching and scholarship. WCU's *Plan for Excellence*—the University's blueprint of strategic priorities—includes internationalization as a key element of the Responsiveness Transformation: to "integrate an international, global, and/or intercultural focus into teaching, research, learning, and service activities" (*Plan for Excellence: An Update*, 2007). Many of our faculty members have been instrumental in implementing this priority by their willingness to design, sponsor, and lead courses abroad.

The purpose of this guide is to better acquaint WCU faculty with best practices for successful study abroad programs. The Global Development Collaborative (GDC), the faculty and staff advisory body for WCU's internationalization, envisions this guide as a tool supporting the entrepreneurial spirit with which so many faculty have initiated courses abroad. Our aim is to make such courses easier for professors designing them, safer for students and faculty participating in them, and ultimately more successful academic and intercultural experiences for all. Following the procedures and practices outlined in this guide will make it possible, in an ever more complex and sometimes challenging global environment, for WCU faculty-initiated undergraduate and graduate study abroad programs to succeed and thrive.

Section I of this manual provides a general guide to issues and procedures. Faculty considering offering courses abroad for the first time, or faculty experienced with study abroad but considering new courses abroad, are encouraged to use this section to assess the feasibility of the study abroad plan.

Section II deals with specific aspects of risk management, and requires your special attention. The information in this section of manual cannot eliminate every challenge, but can minimize risk, address liability, help prevent crises, and provide best practices in case crises occur. Proper risk management is crucial to the creation of a positive international study experience.

Section III provides advice on ensuring that students (and parents of minors) understand and are adequately prepared for the challenges of travel and the conditions of study abroad. Such challenges are real, and they vary according to location and situation. Faculty have a special responsibility to made sure students know the physical realities and attitudinal preparation that international travel and intercultural living require, if the course is to be a success.

Section IV details financial processes, including legal requirements as well as contractual logistics.

Three appendices follow the main body of this manual. **Appendix A** is a collection of necessary forms. **Appendix B** provides example documents on which you may model your site-specific informational handouts for students on topics such as housing, health, and essentials to pack. **Appendix C** offers a checklist of required procedures and foreign travel discussion points with WCU Finance and Business Services.

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The initial draft of this document came through the concerted efforts of the GDC's Risk Management Subcommittee:

Dr. Wei Wei Cai, Professor of Elementary Education;
Dr. Idna Corbett, Dean of Undergraduate Studies and Student Support Services;
Ms. Marguerite Gould, Director of Operations, Amazon Center for Environmental Education and Research;
Ms. Angela Howard, Asst. Director of International Studies, Center for International Programs;
Dr. Bill Lalicker, Professor of English; Director, Global Development Collaborative;
Professor Ana Cristina Sanchez, Instructor of Languages and Cultures.

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Dr. William Lalicker, Director, GDC, chaired the Risk Management Subcommittee and served as final editor of this publication.

SECTION I: Initiating the Course Abroad

CIP: Center for International Programs

I.i.: A Timeline

The following timeline provides a general guide to required preparatory procedures. Faculty are encouraged to consult the CIP for clarification and details, or for specific information on best practices.

Completion of all documents and procedures related to risk management and security is strictly required for reasons of legal liability and safety. Additional detailed requirements are described in boldface at several points in the subsections of this document.

The timeline described below is highly recommended as a **minimum allowance** for reasonable preparation and completion of the necessary steps toward establishing a faculty-initiated, faculty-led course abroad.

All steps listed in this timeline are required to ensure successful academic outcomes and a positive experience for all participants.

Seven months prior to departure date

- Discuss course or trip plan with department chair and dean to solicit advice and ensure administrative approval of course and trip objectives.

Six months prior to departure date

- Meet with personnel at CIP (McKelvie Hall, Room 302, ext.3515) to receive informational manual and discuss trip plans.
- Meet with Finance and Business Services (201 Carter Dr., Room 204, ext. 2223) to receive suggestions and information on how to proceed with fiscal preparations and best practices.
- Have all academic, risk management, and financial forms (as applicable) submitted and approved. **Required forms** include: Request for Faculty-Led Study Abroad Form (SA-1, pages 27-28); Risk Management Form (SA-2, page 29); and any approvals required by your dean, or the head of your academic or administrative unit. (For more information, see applicable sections of this guide, plus Appendix A for forms.)

Four months prior to departure date

- Distribute basic course information, travel information, financial requirements, and a registration form (based on the Registration Model Document, MD-4 in Appendix B, page 48) tailored to your specific trip, to students and other appropriate trip participants.

90 days prior to departure date

- Confirm to offices to which forms were submitted whether trip is viable or (due to circumstances such as insufficient student interest, deterioration of health conditions or political unrest on site, etc.) cancelled.

- Receive all completed registration forms (modeled on MD-4, as noted above) from students and other travelers; provide copies to department chair and CIP.
- Complete Support Services and Contractor Information Form (SA-3, page 30) for approval by CIP.

<u>30 days prior to departure date</u>

- Confirm that Support Services and Contractor Information Form (SA-3, page 30) has been approved by CIP.
- Provide Communications Chain Form (SA-4, page 31) and Emergency Contact Information Form (SA-5, page 32) to department chair (or head of administrative unit) and CIP.
- Provide Recognition of Risk Form (SA-6, pages 33-35) and Liability Release Form (SA-7, page 36) for every traveler to the CIP.
- Schedule and begin conducting student orientation and briefing sessions (see Section III).
- Confirm all cost details (such as results of variable transportation charges) to all travelers.
- Provide all travelers with detailed itinerary (including departure and arrival information), housing and meals information, and all in-country transportation and communication information.

<u>One week prior to departure</u>

- Complete student orientation and briefing sessions.
- Confirm any changes (cancellations) to traveler list, and file with CIP.

- **Plan early**
- **Follow guidelines and timelines**
- **Submit required documents**

I.ii: Academic Considerations

Any successful study abroad offering must take into account not just the complexities of travel and the promise of intercultural learning, but the ways in which academic requirements can intersect with the international experience. Academic credit options, term structure options, course format, minimum and optimal class size, faculty pay and workload—all can influence the success, or even the viability, of the course you are planning. The following outline lays out some of the issues and conditions you should have in mind.

1) Academic Credit

a) Courses taught by WCU faculty

1. Registration—Course should be entered into PeopleSoft with sufficient time for students to register during regular scheduling period. Students enroll in the course as they would with any other course.
2. Allocation of credit—Students receive WCU credit for the course, depending on the number of credits originally assigned.
3. Tuition—Students pay tuition for the course according to WCU tuition scale.
4. Credit for graduation—For most courses, the credits will be considered as electives; some courses abroad may carry general education credit. In either

case, credits will count toward graduation and grade earned will be computed in the grade point average: students should be aware that the unusual venue of the course does not change the academic requirements and effect on academic standing.

b) Courses taught by host institution faculty

1. Registration—Students enroll in the course according to the policies and procedures of the host institution. You, as WCU faculty member mediating the international learning experience for your students, serve as the liaison to your students concerning the registration process.
2. Allocation of credit—Students may request to receive transfer credit for the course. Approval of transfer credit will be the responsibility of the WCU home department (WCU faculty member acting as liaison should determine transferability prior to establishing the project abroad).
3. Tuition—Students pay tuition for the course according to host institution's tuition scale. Faculty member works with Finance and Business Services to facilitate the process. **Faculty members should not take direct payment from students.**
4. Credit for graduation—Transfer credits count toward graduation. However, grade earned for transferred credits will not be computed in the grade point average.

2) Course Approvals

CAPC: Curriculum and Academic Policies Council

a) New course

1. Course creation policies and procedures—Faculty members are responsible for following existing Curriculum and Academic Policies Council (CAPC) policies and procedures for creating a new course. Since most courses will be considered electives, the New Course Proposal form may be submitted for monthly course circulation and approval.
2. Timelines/deadlines—New Course Proposal form should be submitted to the Office of the Associate Vice President for Academic Affairs with sufficient time to allow for circulation, approval, and inclusion in PeopleSoft in time for priority registration. For course to be offered in first summer session, the course approval process must be started by November of the previous fall semester. Additionally, submit your plans to the dean of your college and the chair of your department, providing sufficient time for course approval.
3. Allocation of credit—Credits to be allocated will be delineated on the New Course Approval form and adjudicated according to the CAPC approval process

For both new or an existing course, faculty member must secure approval from the dean of the college and chair of the department or program with jurisdiction for the course. Sufficient time must be allowed to secure approvals.

b) Existing course

1. Dean's and chair's approvals must be secured with sufficient time for the course to be included in PeopleSoft online registration system in time for priority registration.

3) Faculty/Staff Compensation

a) Standard compensation for WCU credit-bearing courses

1. Faculty compensation and benefits will be determined by the current Collective Bargaining Agreement (CBA) salary schedule.
2. Faculty may receive a cash advance for payment of airfare according to the stipulations of the home department, which is not to be considered part of the compensation (note: provision, or non-provision, of cash advance is strictly a departmental determination).

CBA: Collective Bargaining Agreement

b) Non-instructional, trip assistant/chaperone compensation

1. Additional faculty and/or staff may be selected as trip assistants or chaperones with no teaching responsibilities during the trip. Compensation, if any, will be determined according to the stipulations of WCU Human Resources and the applicable bargaining unit, and is subject to agreement by the department chair and dean of the department or division in which the individual is employed.

c) Not-for-WCU-credit field trips, or individualized instruction compensation

1. Faculty salaries, compensation, or honoraria will generally not be provided within the CBA, but may be provided by a host institution.
2. When the trip is embedded into a course, with no additional credits assigned, the faculty member will not receive any compensation beyond the regular salary received for teaching the course.
3. Faculty compensation for individualized instruction will be processed as stipulated on the current CBA policies and salary schedule (if individualized instruction has been authorized).

4) Instructional Formats (Field Trip, Workshop, or Complete Course)

a) Field trips and workshops (end-of-semester, interterm, spring break)

1. Format alternatives—Faculty members may choose to offer travel opportunities as part of a course or independent of a course.
   - If the trip is embedded in the course, it must be planned for a time when it will not interfere with other academic responsibilities of the enrolled students. Student participation in the trip must be optional and failure to participate must not affect students' final grades.
   - If the trip is independent of a course, the faculty member and students may select trip dates, as long as the dates do not interfere with the academic calendar.
2. Minimum number of students required—The minimum number of students for the trip will be determined by the nature of the trip, costs involved, and

policies and regulations of the home department, subject to approval by the dean of the college.

3. Sponsorship options—Offices and groups, other than academic departments, may sponsor spring break trips or end-of-semester trips. Regulations for these cases will be determined by the vice president of the division sponsoring the trip.
4. Grade submission options—Grades may need to be submitted after the usual grade submission deadline for a given term if, for instance, fieldwork abroad is carried out during a summer session but additional coursework is required after the return to campus; check with your department chair and the Office of the Registrar to make acceptable arrangements for a modified deadline.

PASSHE: Pennsylvania State System of Higher Education

b) Courses

1. Academic semester—In most cases, a course abroad will not be offered during the academic semester, as it would interfere with the academic calendar. However, students who wish to go abroad independently may enroll and earn course credits in accredited institutions, and may choose to consult with WCU faculty concerning applicability to WCU programs (majors and minors), and WCU course transferability.
2. Summer session—Courses taught during one of the three summer sessions are the most common occurrence. Decisions regarding in which summer session to offer the course rest with the faculty member, in consultation with the home department, subject to approval by the dean of the college; faculty member should ensure appropriate coordination with the schedule of any host institution. See also the comment on "Grade submission options" in 4.a.4 above. (Note: The Pennsylvania State System of Higher Education is currently initiating an online system to coordinate short term study abroad courses transferable among PASSHE institutions; please consult the PASSHE website for more information about listing your course in this system, or to locate transferable course credit from sister institutions' short term study abroad offerings.)

ADA: Americans with Disabilities Act
OSSD: Office of Services for Students with Disabilities

5) Students, Faculty, and Travelers with Special Needs

a) Required accommodations under the Americans with Disabilities Act (ADA)—The University is responsible for investigating the availability of accommodations in the host institution/country. Students must be registered with the Office of Services for Students with Disabilities (OSSD) and must submit to the faculty member, at or before the time of registration (and earlier if possible), a letter of accommodation outlining the nature of the accommodations needed.

b) Assessment of and access to support services on site—It is the responsibility of the faculty member to inquire, to a reasonable degree, whether the host institution or host country's ability to provide accommodations may be adequate and appropriate, and to

consult with OSSD as necessary. The faculty member will inform the student of the nature and quality of the accommodations available. It will be the students' responsibility to decide whether the accommodations meet his/her needs and whether he/she will go on the trip.

c) Contact persons—As each case may be unique, please contact Dr. Martin Patwell (ext. 3217) or Ms. Barbara Schneller (ext. 2513) for support, advice, and situation-specific information.

I.iii: Financial Considerations

Study abroad programs have always been available for students with the money to pay third-party vendors; for WCU to achieve the true internationalization that does "integrate an international, global, and/or international focus into teaching, research, learning, and service activities" (to reiterate the *Plan for Excellence* priority cited above), the GDC believes that study abroad ought to be an option for every WCU student, whatever that student's financial status. In a practical sense, making your course accessible to the broadest possible cohort of students will help you enroll an adequate number to justify the course offering. And having a clear accounting of costs and cost-tracking will keep you out of a financial bind as you manage a budget for transportation, housing, and the myriad charges that study abroad entails. Some of the questions you should consider:

MOU: Memorandum of Understanding
MOA: Memorandum of Agreement

- What is the cost of transportation to the host site?
- What arrangements for travel (airline tickets, etc.) will be paid for by the faculty member, and what will be handled independently by students?
- What is the cost of transportation within the country, and how will the financial logistics paying for such transportation be arranged?
- What is the cost of housing? (Can a partner institution provide low-cost housing, or do homestay families or hotels need to be paid?)
- What is the cost—and quality—of food? (Can a partner institution provide food for a fixed cost at a cafeteria, or will students be paying local restaurants?)
- Do I have contacts who can assure that financial transactions will be completed and commitments met by vendors in-country?
- What contacts to I have to ensure quality of all services, and to help troubleshoot unexpected charges or costs?
- By what date do I have to commit to contracts for food, housing, transportation—especially crucial when costs are changeable?
- Are costs affected by number of students traveling—that is, are there economies of scale?
- Does WCU have a Memorandum of Understanding (MOU) with host institution—a general partnership commitment—that might lead to a Memorandum of Agreement (MOA), a contract for specific services at specific costs? (Check with the CIP as detailed in Subsection I.iv.)
- How will funds be collected, accounted, and confirmed (**as faculty should not take direct payment from students)**—and will WCU contracts, or faculty direct payment, or

student direct payment be made to any vendors? (Specific procedures and requirements apply in some circumstances, as detailed in Section IV.)

- Will students be provided refunds in case of problems or cancellation—for what specific charges, and according to what specific terms? **Students must be provided a written policy for refunds in case of cancellation. Please contact the CIP (ext. 3515) for advice on establishing your refund policy, and distribute that written policy to all student participants.**
- Can some, or all, of the logistics for the course be more economically or efficiently handled by a third-party provider (a company specializing in study abroad), rather than my own design for the trip? (Check with the CIP, which maintains a library of information on such companies, their services, and their prices.)
- Will financial aid be available to students using this study abroad format? (Check with the Office of Financial Aid; some formats and courses are more financial aid friendly than others.)
- How can I make this affordable for students, still covering all necessary costs?

> - **Provide a written policy for refunds**
> - **Do not accept direct payment from students**

I.iv: Establishing Best Practices

Faculty who want to design and lead a course abroad can avoid problems, maximize success, and establish best practices by using the services and expertise of University resources at the very outset of the planning process. **Each faculty member, once a general plan for the course has been devised, should consult the timeline above (I.i) and design the strongest possible study abroad experience by meeting with the following individuals or offices**:

- Department chair, to discuss course viability, potential and acceptable student enrollment, and financial considerations such as faculty compensation.
- Dean of the college, to discuss course viability, potential and acceptable student enrollment, financial arrangements, and any special conditions that might be part of the study abroad plan.
- Office of Finance and Business Services (201 Carter Drive, ext. 2961), to ensure that all financial arrangements follow WCU and PASSHE procedures.
- Center for International Programs (McKelvie Hall, Room 301, ext.3515) to ensure that a proper MOA has been established with any host or partner institution. (This provision generally does not apply when courses are arranged through third party providers or vendors; contact the CIP to confirm applicable requirements.)

> **The MOA is a legal contract laying out responsibilities and liabilities concerning all financial, academic, and logistical arrangements. Failure to establish an MOA that has been vetted and signed by WCU officials and responsible parties at partner institutions leaves faculty and the institution at significant risk. Don't leave home without a copy of the current MOA.**

- **Center for International Programs (McKelvie Hall, Room 302, ext. 3515), to receive an informational briefing and procedural manual on their services and requirements, to discuss risk management, and to receive general advice on issues specific to your course, format, and site.**

Best practices include an active assessment of the entire study abroad experience. Faculty should gauge the success of the course from an academic, financial, and risk management perspective, and according to the experiential goals (such as cultural understanding or service-learning goals) designed into the course for the students, by creating an assessment survey tailored to the specific trip and modeled on the Experience Abroad Evaluation Model Document (MD-5 in Appendix B, page 51). Results of this assessment can contribute to ever-improving study abroad experiences.

SECTION II: Planning for Safety, Security, and Risk Management

II.i: Health Safety

- **Include health safety early in pre-travel requirements**
- **Highlight its importance frequently**

Faculty members and program participants must be aware of and prepared for any health risks of traveling abroad to the study site, and **health safety must be a topic in written materials introducing pre-travel requirements as well as in orientations and pre-departure briefings**. The Health Information Model Document, MD-2 in Appendix B (page 41) of this guide (from the Amazon Center for Environmental Education and Research), provides an excellent example of the details your health briefing should provide. Faculty should consult the Centers for Disease Control and Prevention (CDC) Traveler's Health website, www.cdc.gov/travel, for country-specific information such as recommended immunizations and food and water safety, and should distribute appropriate information from that website to all potential travelers. **Students should also be encouraged to consult the website.**

Faculty may also ask WCU's CIP for referral to other University personnel who may have traveled previously to the study site or global region and can provide further information on health (as well as other country- or region-specific issues).

Faculty, staff, and students should consult their personal physicians for appropriate immunizations. Some countries require proof of immunization prior to travel; faculty should inquire about such requirements at the applicable consulate when investigating passport rules and visa requirements.

In case of a sudden health emergency (outbreak of communicable disease, etc.) in the host country, consult the local U.S. consulate, as well as the CDC website referenced above, for information and instructions.

II.ii: Personal Safety in the Country and at the Site

A number of considerations apply to personal safety in the study abroad situation. First, of course, is common sense and an awareness of surroundings; but several useful resources are available for guidance concerning personal safety. Please make personal safety information part of the orientation and pre-travel briefings that you provide to students. Some of the issues to consider:

- General safety and security abroad—Program participants must be made aware that tourists may become targets of theft and assault in some countries. Students must understand that it is necessary to avoid situations where their personal safety might be in danger. All participants should know how to keep valuables (passport, money, credit cards, etc.) safe; money belts or packets to be worn under the clothes are helpful. Travelers should know how to replace a stolen passport: they should have a photocopy of the passport and relevant credit cards (both sides of all credit cards) at home for reference and a photocopy in a secure place among the traveler's belongings; specific passport replacement procedures can be found on the website of the U.S. embassy in the host country (visit www.travel.state.gov for links). Similarly, travelers should make sure that they have information about how to cancel stolen credit cards. A photocopy of both sides of each credit card and health insurance card should be left at home for reference and a copy carried during the trip.
- Country-specific and host site security—With the dynamic environmental, political, and social climates around the world, it is very important to be aware of the state of affairs in your host country. The U.S. Department of State's Bureau of Consular Affairs publishes Travel Warnings to advise Americans against traveling to countries whose conditions may pose a threat to travelers (i.e. tsunami disaster, political uprisings). Visit www.travel.state.gov to view the latest Travel Warnings.

WCU strongly recommends that any faculty-led or sponsored program be cancelled if a Travel Warning is issued in the program's host country. In case of sudden political upheaval, consult the local U.S. consulate for information and instructions. In an exceptional situation, the University may cancel any faculty-led or sponsored program if there is a compelling reason to do so.

- Legal issues—Program participants are subject to the laws of the host country. It is the responsibility of the traveler to know the host country's laws and to obey them. Make every effort to inform students and other travelers of unusual laws and special legal expectations in the host country. If a traveler is arrested, he or she may not receive the same legal treatment one would expect in the United States.
- Natural emergencies and disasters—Know the climate and typical disaster risk of your host country, with special attention to the season in which you plan to travel. Students and other travelers should be prepared for possible emergencies.

It is required that you consult with the WCU CIP to ensure that your risk management plan is appropriate for the region and season in which you plan to travel.

It is strongly recommended that all program participants should register with the U.S. embassy or local U.S. consulate in the host country via the embassy's web site by visiting https://travelregistration.state.gov/ibrs/ (have your passport on hand). For additional information, check out the host country's consular information sheet at www.travel.state.gov.

- **Share tips for personal safety with students**
- **Inform students of cultural norms, social expectations, and laws of host country**

II.iii: Behavior and Cultural Awareness

Faculty should emphasize issues of behavior and cultural awareness in every orientation and pre-travel meeting. Students must understand that they are guests in the host country as well as de facto representatatives of American and WCU standards of courtesy. There are several topics that faculty should communicate to students and travelers for proper risk management and a successful travel experience:

- Behavior and alcohol use—Faculty and other travel leaders should clearly state behavior expectations and the consequences of violating those expectations prior to departure. Faculty should refer to the WCU Student Life policies for guidance. Because other countries frequently have lower drinking ages than the United States, the misuse of alcohol can become a problem on programs abroad. Illegal drugs should never be used while in transit or when in the host country.

Expectations of personal responsibility and safety regarding the use of alcohol must be a topic in written materials provided in orientations and pre-travel briefings.

Just as you have a plan for dealing with health emergencies, have a plan for dealing with inappropriate and/or dangerous alcohol use; consult with the WCU Student Health and Wellness Center (ext. 2509; ext. 3276) for advice and informational materials.

- Culture shock—Students and other travelers may find themselves in emotional distress when confronted with unfamiliar or potentially disturbing social realities or cultural surroundings, and discussing culture shock is a key element of effective pre-departure programming. Informed students can identify the signs of culture shock and are better able to cope with it. Faculty should be prepared to counsel students regarding culture shock and other stressors on site. WCU's CIP can provide information to help you prepare trip participants concerning this issue.

II.iv: Transportation Safety

- **Use established safe travel services**
- **Obtain all required information about travel service providers**

Transportation should be a main focus for risk management. In general, travel to the study abroad site will be by a properly licensed and regularly scheduled air carrier; consult with WCU's CIP for suggestions and advice based on the experience of other WCU travelers to your region. (Third party vendors—study abroad logistics companies—may have successful and dependable charter services.) Although it is conceivable that some study abroad projects may allow participants to travel independently and assemble as a group only in the host country, this is potentially problematic due to inconsistencies of schedule and the challenge of getting all parties together at the study site. Moreover, group travel is generally cheaper, and allows the collaborative aspects of study abroad to begin as soon as the group embarks from the United States.

Special attention must be paid to in-country transportation.

Established travel services must be used and the following information kept on file, for access in case of emergency, for each company used by groups traveling abroad:

- Name, address, telephone number, email address, fax number, contact person.
- Registrations (licenses or certificates of bondedness that may be required).
- Insurance carrier name, and proof of insurance held by company.
- Safety information (details of safety equipment, as applicable to the mode of transportation to be used; certification of licensed operators; documentation of equipment inspection).

If you are using contracted travel services, it is required that you complete the Support Services and Contractor Information form (SA4 in Appendix A, page 31) and file the form properly with the CIP.

II.v: Communications Safety

- **Keep appropriate communications equipment when you travel**

Any faculty member leading a trip abroad must have appropriate communications equipment available for emergencies. Depending on the location of the trip, any or all of the following may be appropriate:

- International calling card—make sure it is compatible with use in the host country (many cut-rate "international phone cards" sold in the U.S. work for calls from the U.S. to foreign countries, but not from foreign countries to the U.S., or not within the host country).
- Cell phone compatible with mobile systems of the host country (in some cases, reasonably priced telephones and user-minutes can be bought on site—check with contacts in the host country).

- Satellite telephone—to find out if you need a satellite phone in your host country or likely locations of operation, please contact WCU telecommunications personnel Adel Barimani of Information Services (Anderson Hall 23B, ext. 3476) or Joseph Sincavage of Networking and Telecommunications (Bull Center 101, ext. 3535) for information and to order the necessary equipment. Cost varies based on service carrier (for instance, WCU currently has a contract with AT&T, which may operate at some locations); research phone company websites for additional options.
- U.S. domestic cell phones can be converted to international access capability, in some cases; check with your mobile wireless service and/or the telephone's manufacturer.

Any individual listed on the Communications Chain Form (SA-4 in Appendix A, page 31) filed with the CIP must have appropriate equipment and preparation to fulfill the communications role in case of emergency. Individuals assigned communications role must have copies of the Communications Chain Form and also the Emergency Contact Information Form (SA-5 in Appendix A, page 32).

- **Ensure quality, safety, and cleanliness of housing (hotel, residence hall or private home)**

II.vi: Housing Security and Home Stays

Housing generally falls into one of the following categories: hotels; institutional housing, such as the residence halls of international partner institutions; or home stays, in which host families share local residences with study abroad participants.

Hotel arrangements may require significant vetting on the part of the trip leader.

Hotels must be investigated for quality, appropriateness, and cleanliness of facilities (especially when independent local hotels are used), and financial arrangements must be carried out in accordance with WCU fiscal and contractual policies (see Section IV of this guide). Make sure to complete the Support Services and Contractor Information Form (SA-3 in Appendix A, page 30), and file it with the CIP.

It is wise to consult with a travel agency as well. Third party provider services (international study abroad programs that have established housing logistics) may be preferable to ad hoc arrangements; consult the CIP for information.

Host institutions may have suitable housing for students in residence halls, depending on when the planned study abroad trip intersects with the host institution's own academic calendar. Check with the CIP to see if a prior MOU—the general document establishing inter-institutional relationships—exists. If so, develop a MOA—the detailed contract laying out terms of services provided by each party in a specific project—with the support and advice of the CIP. An MOA may be written to include appropriate housing arrangements. It is wise to have had WCU personnel previously on-site at your study abroad location to inspect the proposed housing for suitability. If possible, talk with previous travelers to the host institution to obtain an assessment of housing.

Home stays require more complex vetting of both the physical housing and the host family. In general, the following requirements apply:

Host families must be vetted through all appropriate background checks (some study abroad programs recommend criminal checks on all family members; consult with WCU's CIP for more detailed advice on this matter).

- The cost of any background checks should be factored into trip costs or otherwise covered to ensure that there is an adequate and clear budget for this purpose; the trip budget must specify how such background checks are funded and who is responsible for paying for them. Third party providers and vendors should perform such vetting as a standard practice. Any independent acquisition of host families must be vetted according to the highest standards in consultation with the Center for International Programs.
- **Faculty must provide documentation on how host family vetting has been performed according to methods approved by the CIP, and such documentation must be on file at the CIP**. (Please see the Student Information for Home Stay Model Document, MD-3 in Appendix B, page 44, as an illustration of issues and conditions significant to harmonious student-family matches. See the CIP for an example form for you to adapt.)
- **Faculty must vet students and other participants to determine the most appropriate match between the traveler and the host family**. (Please see the Student Information for Home Stay Model Document, MD-3 in Appendix B, page 44, and adapt as appropriate for the specific study abroad situation).
- **Faculty must provide written directions for problem-solving procedures for each student, should difficulties or conflicts occur in home stay residence, including emergency contact numbers, access to communication, and name of on-site problem-solving authority (faculty member, travel assistant, chaperone)—typically, a professor familiar with the local culture and language**.
- **Minimum requirements for an appropriate home stay residence are:**
    - Individual rooms for each WCU student, unless two WCU students agree to share space;
    - Desk for each student.

Faculty must consult the CIP (ext. 3515) to discuss home stay details and to obtain a form to vet potential host families and ensure that each home stay location is an appropriate place and safe haven for students. The CIP will have appropriate site-specific and logistical advice for this most important element of risk management and successful study abroad. Faculty whose knowledge of the local culture and connections with local authorities are insufficient to ensure maximum safety in the home stay location are advised to contract residential services only through appropriate certified vendors (again, the CIP is your best resource for information and support).

II.vii: Insurance and Liability

- **Ensure every traveler has travel and health insurance**
- **File the insurance information with CIP**
- **Have every traveler complete the Liability and Recognition of Risk Forms**

Travel and health insurance must be purchased by the traveler, and must be explained in written orientation materials and discussed in pre-travel meetings.

Copies of each traveler's insurance card and/or policy number, and policy details if appropriate, must be provided to the CIP and on the registration form that you will adapt for your trip based on the Registration Model Document (MD-4 in Appendix B, page 48). Contact information for the insurer must be included.

There are many travel insurance providers available. TravelGuard and AIG are examples; the Center for International Programs can provide more information. An International Student Identity Card (ISIC) for full-time students is available from TravelGuard. The ISIC provides the basis for health and accident insurance to be issued according to student status. Additional coverage is recommended, especially medical evacuation insurance. Parents' insurance may apply; study abroad travelers are responsible to determine and obtain the most appropriate available insurance.

The Liability Form (SA-6 in Appendix A, page 33-35) and Recognition of Risk Form (SA-7 in Appendix A, page 36) must be completed by faculty and students.

Additionally, travel vendors often establish and require completion of their own insurance and recognition of risk forms.

For faculty-led WCU-based travel, ALL students must complete the Liability Form and Recognition of Risk Form.

II.viii: Crisis Management Plan

- **Be prepared for possible crises**
- **Think through "what if" scenarios before the trip**
- **Always have contact information and necessary documents handy**

Crisis management must be considered seriously before a crisis occurs. Mental preparation comes first. Faculty should prepare mentally by asking themselves what they might do in the following situations:

- A student's behavior jeopardizes his or her safety or the safety of the group.
- A student's money or credit/ATM cards are stolen.
- A student's passport is stolen.

- A student was distressed or suicidal.
- A student develops an illness requiring medical treatment.
- A student is injured and required medical treatment.
- A student is arrested.
- A student is missing.
- A student dies.
- An emergency (natural disaster, terrorist action, political crisis) puts all program participants in danger.
- The faculty leader of the trip is incapacitated by injury, illness, or some other emergency event.

Section II of this guide has provided answers to many of these questions already, and the required procedures and information provided in the forms established in this guide will help you to be prepared to answer these questions for your specific study abroad site. **Remember to have copies of key documents—passports, visa pages, emergency contact numbers at home and in the host country, as noted above—for timely response to all contingencies.**

The names you list on the Communications Chain Form (SA-4 in Appendix A, page 31) and the Emergency Contact Information Form (SA-5 in Appendix A, page 32) constitute the crisis management team.

Faculty trip leaders must have this information completed and approved by the CIP as part of the trip planning process. This form absolutely must be approved by the CIP designee before a trip may occur. **Copies of completed forms must be on file in the CIP and in the Office of the Provost.**

Additionally, faculty trip leaders must have with them the students' emergency contact information provided as part of the registration forms; the Registration Model Document (MD-4 in Appendix B, page 48) requires telephone, fax, and email addresses.
Note that faculty must be familiar with local requirements of telecommunications from the host country, such as country codes (calling the United States requires use of the country code "01" from some countries, "011" from others, etc.) so that contacts can be made swiftly at moments of emergency.

In case of emergency, faculty trip leaders should follow this general order of steps:

1. Ensure that students/trip or program participants are safe; seek medical or help from police and/or embassy.

2. Activate the communications chain. The first step in the communications chain sequence is to call WCU Department of Public Safety at 610.436.3311. The CIP provides Public Safety with the Communications Chain Form (SA-4 in Appendix A, page 31) with department and administrative telephone numbers specific to crisis management for your trip. Faculty may also consider it advisable to follow up with any point in the communications chain sequence, as follows:

- WCU Department of Public Safety……610.436.3311

- Center for International Programs…….610.436.3515
- Academic department in which course is offered……..610.436.____
- Dean of the college in which course is offered……...610.436.____
- Office of the Provost……...610.436.3405
- Office of the President……610.436.2471
- Finance and Business Services……..……..610.436.5654/2223

3. Write an incident report and keep a signed copy. The report should provide the most precise details possible concerning the incident and individuals involved. If possible, fax the report to the CIP at 610.436.3426. Faculty may also email information to contacts at WCU (though email is not advisable when immediate response is necessary).

4. Maintain a written log of all details of the emergency. Dates, names, and details are necessary.

5. Stay with any injured or arrested student (faculty or designated trip leaders may take this responsibility).

6. Ensure that in-country program staff, official guides, or other reliable support staff stay with the remainder of students and travelers.

West Chester University thanks the University of North Dakota's Office of International Programs for adapted use of crisis management procedural information.

In case of emergency:

- **Ensure safety of the affected traveler**
- **Seek help of local police and/or embassy**
- **Activate the communications chain**
- **Develop an incident report; sign it; keep it with you.**
- **Fax the incident report to CIP**
- **Maintain a written log of all details of the incident**
- **Ensure safety of other travelers including self**

SECTION III: Preparing Students and Parents

III.i: Student Briefings and Orientations

- **Conduct multiple mandatory pre-trip information sessions**
- **Reiterate cultural norms, health safety, and travel safety once you reach the host country**

Faculty leading trips abroad must schedule information sessions prior to departure, to give students the itinerary, course requirements, costs, cultural introduction, and other information (such as visa and insurance requirements) about the course and trip.

At least two such briefing and orientation sessions must be held, at times designed to fit the schedule of all travelers; faculty must **consider such orientations mandatory for all travelers**. Written handouts should be provided to summarize all pertinent information; but distribution of written materials (or electronic documents) is insufficient, as meetings should be designed to allow for dialogue and the chance for travelers to ask questions. Such sessions are also a good way for faculty trip leaders to ascertain any possible unsuitabilities in potential travelers, and to seek ways to solve any perceived problems (remember to consult the CIP on such matters). The meetings are also an excellent opportunity to build a sense of community and collaboration that may be useful when the challenges of travel are encountered.

At least one month prior to departure, faculty should arrange a final trip information session for all students registered for the course/trip. The following items should be distributed:

1. Information packet containing:

- What to expect—a general introduction to the country and its culture.
- Passport and visa requirements.
- Introduction to political, religious, transportation, linguistic, communications, and economic systems of the country or region.
- Introduction to the natural systems (including natural-disaster risk and preparation) and climate of the country or region.

2. Emergency reference list containing:

- Names, contact person information, and telephone numbers of any parties, including third party vendors, responsible for logistics, housing, and transportation.
- Contact person information, telephone number, and address of nearest U.S. embassy or consulate in the host country.
- WCU emergency telephone numbers—Public Safety (610.436.3311), CIP (610.436.3515).

3. Preparation and packing information based on Preparation and Packing Model Document (MD-1 in Appendix B, page 38).

4. Health information on form based on Health Information Model Document (MD-2 in Appendix B, page 42).

5. Course syllabus with all requirements and deadlines; or other academic requirements appropriate to the trip purpose and format.

Once on-site at the study location, soon after arrival, faculty leaders should hold an "in country" briefing, mandatory for all travelers to attend, to reiterate safety and cultural issues.

III.ii: Student Responsibilities

In initial contacts with students inquiring about the study abroad opportunity, and in subsequent briefings and orientations, faculty must emphasize student responsibilities to handle the special requirements of international study; it is not a vacation. Faculty have the responsibility to provide information and oversight, but study abroad can only be successful when students fulfill standard academic practices as well as the special commitments necessitated by the trip abroad. For instance, faculty should emphasize that course requirements must be completed as outlined in the course syllabus, according to the deadlines provided.

Students who travel on WCU sponsored study abroad or faculty-led workshops are required to abide by the West Chester University Student Code of Conduct.

Students must be advised to be familiar with the Code of Conduct, and faculty should travel with a copy for reference. Students and faculty may find the Code of Conduct online at http://www.wcupa.edu/_services/stu.jud/Documents/08-09%20Code%20of%20Conduct.pdf.

Students are advised to leave the following items with parents or other responsible persons (for reference in case of emergency):

- Photocopy of passport and visa page.
- Photocopy of driver's license.
- Credit card names and numbers, with cancellation procedure information.
- Copies of prescriptions, eyewear, contact lenses
- Trip itinerary, with contact information by location (as available).
- Names and telephones of designated individuals or offices at WCU (normally, Public Safety, 610.436.3311; Center for International Programs, 610.436.3515; and chair of academic department offering the study abroad experience) to contact in case of emergency.

III.iii: Information Procedures for Parents of Minors

Parents or legal guardians must provide signatures on any forms for which legal signature is required, if students are under 18 years of age. This requirement applies especially to the Recognition of Risk Form, SA-6 in Appendix A, page 33-35; the Liability Release Form, SA-7 in see Appendix A, page 36; and to the registration form for the trip as adapted from the Registration Model Document, MD-4 in Appendix B, page 48.

Parents or legal guardians of minors should be the recipients of the bulleted items listed in II.ii for use in case of emergency.

SECTION IV: Establishing Financial Procedures

- **Get prior written approval from the University President for all foreign travel and travel to Hawaii and Alaska**

Faculty-designed, faculty-led study abroad generally involves a number of major financial arrangements such as transportation and other related services. Good trip planning and management requires that all laws, policies & procedures related to requisitioning and purchasing be followed. In the past, requests for payments of invoices related to international travel sometimes have been presented on payment request forms without the proper approvals; since most of these payments were needed on short notice, poor planning necessitated much more effort on the part of faculty and Finance and Business Services than would have been necessary if the trip planners had adhered to standard purchasing procedures. Faculty who follow the procedures detailed in this section will ensure that financial arrangements for the trip proceed smoothly.

All foreign travel (outside of the contiguous 48 states) requires prior written approval by the University President on the Advance Travel Authorization Form.

IV.i: Planning with Finance and Business Services

- **Contact Finance and Business Services at least four months in advance of your departure date**

When an international trip is being planned, the Finance and Business Services office (201 Carter Drive, Suite 200, ext. 5654, Card Systems Manager or 2223 Director of Accounting) should be notified at least four months in advance of the departure date.

This will allow time for suggestions on how to progress efficiently with the preparations while still following laws, policies & procedures. With advanced notification and details concerning trip plans, Finance and Business Services can advise travelers on approvals needed and any elements that might have procurement implications.

See http://www.wcupa.edu/_INFORMATION/AFA/FBS/Forms/Forms.htm for more information.

IV.ii: Bidding and Procurement

- **Contact Purchasing and Contract Services at x1019 if you have questions**
- **Become familiar with appropriate policies and follow the guidelines**

The purchase of all goods and services must be in compliance with the Commonwealth Procurement Code (Act 57) and other PASSHE policies (such as Board of Governor policies).

Purchases under $10,000 do not require competitive bidding. However prudent business practices must be followed regarding all purchases under $10,000. With a few exceptions, the purchase of all goods and services in excess of $10,000 must be competitively procured.

All goods are procured via a Purchase Order (PO) and all services are procured via a Service Purchase Contract (SPC). Once the need for goods or services is known, a requisition must be entered into the SAP financial system. More information about SAP/E-Requisition and training opportunities is available at: http://www.wcupa.edu/_INFORMATION/AFA/SAP/Default.htm

A Purchase Order, Service Purchase Contract and/or any other contract must be fully executed before the good is received or a service commences. Signature requirements also known as Contracting Authority for a Purchase Order, Service Purchase Contract and/or any other contract are dictated by University policy. **The primary person delegated with the authority to enter into contracts on behalf of the University is Mr. Mark Mixner, Vice President for Administration and Finance. No other person on campus has the authority to enter into contracts unless that authority is delegated in advance and in writing by Mr. Mixner.** More information on University signature authority is available at:
http://www.wcupa.edu/_INFORMATION/AFA/FBS/PROC/PO/ContAuth.htm

Generally Purchase Orders will be processed within 5 -7 business days of receipt of the requisition by Purchasing. If the item requested needs to be bid please allow 2 – 3 weeks to process the Purchase Order. Generally Service Purchase Contract requires a minimum of 3 - 4 weeks to be completed by Purchasing.

WCU's Purchasing Policy can be found at:
http://www.wcupa.edu/_Information/AFA/FBS/PROC/PO/PurcPol.htm (full Procurement Policy)
http://www.wcupa.edu/_Information/AFA/FBS/PROC/PO/ProcPol10k.htm (Procurement Policy under $10,000)
http://www.wcupa.edu/_Information/AFA/FBS/PROC/PO/ProcPol10001k.htm (Procurement Policy over $10,000)

Please contact Purchasing and Contract Services at extension 1019 with any questions.

IV.iii: Wire Payments and Foreign Bank Transfers

- **Avoid wire transfer of funds**

Although payments can be made by wire, Finance and Business Services discourages this practice. Sending wires to a foreign bank is difficult because 1) proper account and routing numbers are required, 2) those numbers can be difficult to obtain for foreign banks, and 3) a wire sent to the incorrect account number or bank can be difficult and time consuming to retrieve in order to recover funds. If a wire is to be sent, it is vital that we obtain and provide the correct banking information.

Wire transfers are a form of payment, and they require adherence to all standard procurement laws, policies and procedures.

IV.iv: Purchase Cards, Travel Cards, Cash Advances, and Vouchers

- **Use a Travel Card for funding travel in advance; cash advance is another option**
- **Convert all receipts to U.S. dollars**
- **Submit travel expenses along with all receipts within two weeks of return**

The travel card program option provides a method of charging individual employee travel expenses incurred during official business travel on behalf of WCU. Contact Finance and Business Services (ext. 5654 or 2223) for details concerning card usage. Faculty and staff will receive a bill for all travel card purchases and are required to submit a Travel Expense Voucher for all qualifying expenses in order to be reimbursed.

All receipts must be converted to U.S. dollars and submitted with the travel card bill no later than two weeks after the return date. The processing time of applications for travel cards is approximately four weeks.

Cash advances for travel are available. A request for an advance should be made 30 days in advance of travel. A request for cash advance includes the requirement that the University President has approved the international travel on the Advance Travel Authorization form.

Travel advance checks are issued approximately one week prior to departure. **Within 14 days of the completion of travel, a Travel Expense Voucher must be submitted detailing and supporting all expenses with original detailed receipts.**

While cash advances are available, the travel card is the preferred method of funding travel in advance. Cash advance and Travel Expense Voucher forms are online at http://www.wcupa.edu/_Information/AFA/FBS/Forms/Forms.htm.
All questions regarding any of the above should be referred to Finance and Business Services (ext. 5654 or 2223).

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Appendix A: Standard Forms

SA-1: Request for Faculty-Led Study Abroad Form…….27

SA-2: Risk Management Form……29

SA-3: Support Services and Contractor Information Form…….30

SA-4: Communications Chain Form…….……..31

SA-5: Emergency Contact Information Form……..……32

SA-6: Recognition of Risk Form…….33

SA-7: Liability Release Form……..36

SA-1

Request for Faculty-Led Study Abroad Form

West Chester University

1. Name of applicant_____

2. Department of applicant_____

3. Applicant office address_____

4. Applicant office telephone_____

5. Nature of experience (field trip, course, workshop): _____

6. Format or length (semester, spring break, summer term, short term)_____

7. Name and number of course or experience_____

8. Country(ies) in which travel and study will take place: _____

9. Dates of travel and study abroad: _____

10. Academic credit (list WCU course/number/semester or other): _____

11. Third-party provider, vendor, program operator information (please attach additional information on individual providers if specific services include more than one vendor):

Service provided: _____
Name: _____
Contact Person: _____
Address: _____
Email: _____
Telephone: _____

12. Please attach (completed or tentative) program information, including:

- Course syllabus, workshop or field trip requirements
- Risk Management Form (SA-2)
- Support Services and Contractor Information Form (SA-3)
- Preparation and packing information tailored to your trip, based on Preparation and Packing Model Document (MD-1)
- Health information specific to trip, based on Health Information Model Document (MD-2)

- Detailed (formal or tentative) trip itinerary

13. The following signatures are required, and indicate approval of the above-described study abroad request:

a. Department Chair: Name_____

Signature_____ Date _____

b. Dean: Name_____

Signature_____ Date _____

c. Center for International Programs Officer: Name_____

Signature_____ Date _____

d. University President:

Signature_____ Date_____

Deadlines:

Approval signatures must be in place six months prior to trip.

This form, Request for Faculty-Led Study Abroad Form (SA-1), with all attendant attachments, and with all required constituent forms completed, must be completed six months prior to trip.

SA-2

Risk Management Form

West Chester University

Faculty-Led Study Abroad

1. Name of applicant_____

2. Department of applicant_____

3. Applicant office address_____

4. Applicant office telephone_____

5. Nature of experience (field trip, course, workshop): _____

6. Format or length (semester, spring break, summer term, short term): _____

7. Name and number of course or experience _____

8. Country(ies) in which travel and study will take place: _____

9. Dates of travel and study abroad: _____

This is to certify that said faculty member has:

- **Received briefing on the University's risk management procedures and crisis management plan for faculty-led study abroad;**
- **Received copy of *Designing and Leading International Study Programs: Risk Management and Best Practices for WCU Faculty***

Faculty Member: Name _____

Signature_____ Date_____

Center for International Programs Officer: Name _____

Signature_____ Date_____

SA-3

Support Services and Contractor Information Form

West Chester University

Faculty-Led Study Abroad

Vendor, contractor, or support program name: _____

Nature of service (transportation in-country, etc): _____

Address: _____

Telephone: _____ Fax: _____

Contact name and title: _____

24-hour emergency telephone: _____

Name and number of course, workshop, or program: _____

Faculty leader name: _____

Country of study abroad and vendor service: _____

Dates of travel, study, and/or service: _____

Please attach copies of the following, as applicable:

- Registration certificates or licenses required for service or program.
- Certification of insurance held by vendor or program.
- Safety information provided by service or program.

Transportation type to be used: _____

Licensed operators of transportation: Name (s) _____

License(s) location(s) of issue: _____
(Attach photocopies of licenses whenever possible)

Documentation or certification of safety inspection for mode of transportation (as applicable): please attach photocopies if available

Deadline: This form must be filed with Center for International Programs 90 days prior to travel.

SA-4

Communications Chain Form

West Chester University

Faculty-Led Study Abroad

This form provides a reference list for contacting officials at WCU in case of emergency. Please complete the communications chain information for the sequence that follows. Faculty leaders of study abroad trips, and all responsible parties on the trip, must have this list with them at all times while traveling abroad. Refer to Section II: Planning for Safety, Security, and Risk Management, in *Designing and Leading International Study Programs: Best Practices and Risk Management for WCU Faculty*, for details.

Long distance access code ("country code") applicable to dial the United States from the host country or location of travel…….._____

1. WCU Department of Public Safety……..610.436.3111

2. Center for International Programs……610.436.3515

3. Academic department chair……..610.436.____

4. Dean of academic college…….610.436.____

5. Office of the Provost……610.436.3405

6. Office of the President…….610.436.2471

7. Finance and Business Services……610.436.5654/2223

SA-5

Emergency Contact Information Form

West Chester University

Faculty-Led Study Abroad

This form lists information for **local** emergency management **within the host country** for the study abroad trip. Faculty leaders of study abroad trips, and all responsible parties on the trip, must have this list with them at all times while traveling abroad. Refer to Section II: Planning for Safety, Security, and Risk Management, in *Designing and Leading International Study Programs: Best Practices and Risk Management for WCU Faculty*, for details.

Name and number of course, field trip, or workshop: _____

Name of faculty leader: _____

Country(ies) and location(s) of study trip: _____

Dates of travel and study: _____

Telephone number, local U.S. embassy or consulate: _____

Name and title of contact person, local U.S. embassy or consulate: _____
_____

Telephone number, local emergency services and/or police: _____

Local telephone number of vendor, program, or service provider(s) (as applicable):
_____

Name and title of local vendor, program, or service provider contact person:
_____

Names, titles, and telephone numbers of other useful local contacts:
_____
_____

This form must be provided to the Center for International Programs 30 days prior to trip.

SA-6

Recognition of Risk Form

West Chester University

Faculty-Led Study Abroad

The following agreements are designed to protect STUDENTS on ANY STUDY TRIP ABROAD: participants, students, faculty, its trustees, officers, agents and employees, and the agencies and individuals cooperating with West Chester University of PA. We require all STUDY TRIP participants (and their parents if under 18) to sign these forms to indicate their agreement and permission.

If a participant has a history of any medical or psychiatric problems during the previous two years, we strongly advise that he/she consult with a medical professional in this country before departure to discuss the potential stress and difficulty of travel abroad.

1. I/We , on behalf of myself/ourselves and my/our heirs, beneficiaries, successors or any other person, understand that participation in the program is entirely voluntary and that any program of travel involves some element of risk. I/We agree that in partial consideration of West Chester University of PA sponsoring this activity, I/we will hold West Chester University of PA and the Pennsylvania State System of Higher Education ("PASSHE"), and their trustees, officers, agents, and employees, harmless from any damages for any injury or loss to persons or property the participant might sustain while so participating. I/We hereby release West Chester University of PA and PASSHE, and their trustees, officers, agents, and employees, from any liability whatsoever for any personal injury (including death) or property damage arising from participation in the program. I/We agree to the "Release of Liability" document which is executed along with this document, and I/we agree to indemnify West Chester University of PA and PASSHE, their trustees, offices, agents and employees from and against any loss or claim of any nature arising from my participation in the program.

2. I/We understand that West Chester University of PA or the sponsoring institution reserves the right to make cancellations, changes or substitutions in case of emergency or changed conditions or that is in the interest of the group. Should West Chester University of PA cancel the program, appropriate refunds will be made according to the conditions and limitations set forth in all applicable documents and agreement executed along with this document unless the cancellation is due to political, natural, technological or other catastrophes beyond its control in which case West Chester University of PA will be able to refund only uncommitted or recoverable funds. Refunds in case of cancellation will be limited to the terms of the specific course's written refund policy as distributed with program information materials received prior to the signing of this form. Should another sponsoring institution cancel its program, its refund policy, if any, will apply.

3. I/We understand that participants in the program are representatives of West Chester University of PA and by signing this agreement pledges to comport himself or herself in a manner that reflects favorably on West Chester University of PA. I/We understand that in addition to regular classes the program may include planned lectures and field trips which are germane to the educational experience, and that the participant agrees to participate willingly in such activities in addition to regular classes.

4. I/We understand that West Chester University of PA requires that appropriate sickness and accident insurance cover all participants for the duration of the program, and that I am/we are financially responsible for all medical expenses. In addition, we understand that payment for medical expenses customarily will have to be advanced, and reimbursement sought later from the carrier.

SICKNESS AND ACCIDENT INSURANCE IS REQUIRED FOR PARTICIPATION IN THIS STUDY TRIP

Name:_____

is insured under policy number _____ with (name of insurance company)

_____. The policy expires on _____.

In addition, the traveler hereby assumes responsibility for all medical expenses incurred by and on behalf of the traveler while participating in the program.

5. I/We understand that foreign programs may not regularly employ health care professionals overseas and that West Chester University of PA makes no representation with respect to accessibility of services and facilities abroad. Appropriate treatments, especially psychological, may not be as readily available abroad as in the United States. The participant must, therefore, make provision before departure for continuation of medical treatments such as prescriptions or special diets. The director of the program should be fully informed of any special needs before leaving on the program.

6. I/We authorize all health care providers or other covered entities to disclose to West Chester University of PA or their representative, upon request, any information, oral or written, regarding my physical or mental health, including, but not limited to, medical and hospital records and what is otherwise private, privileged, protected or personal health information such as health information defined and described in the Health Insurance Portability and Accountability Act of 1996 ("HIPAA"), the regulations promulgated thereunder, and any other federal, state or local laws and rules.

7. I/We authorize West Chester University of PA or their representative to disclose, to those designated as emergency contacts, all medical information regarding my physical or mental health, including ,but not limited to, medical and hospital records and what is otherwise private, privileged, protected or personal health information such as health information defined and described in the Health Insurance Portability and Accountability Act of 1996 ("HIPAA"), the regulations promulgated thereunder, and any other federal, state or local laws and rules.

SIGNATURES

The signatures of both the participant and their parent or legal guardian are required (if under age 18). Please return this form (three pages) completed with your registration form.

Your registration is not complete without this signed document.

Student/Workshop Participant:

I certify that I have read the entire preceding agreement, and I join in the articles of the agreement without reservation, granting my consent to all action herein.

Signature_____ Date _____

Parent/Guardian:

I certify that I am the parent or legal guardian of the student named above; that I have read the entire preceding agreement, and I join in the articles of the agreement without reservation, granting my consent to all actions herein.

Signature_____ Date _____

Print Name _____ Phone _____
Email_____

Address
_____
Street City State
Zip code

SA-7

Liability Release Form

West Chester University

Faculty-Led Study Abroad

I, _____(full name of student or traveler and, as applicable, parent or legal guardian of student under age 18), as a participant in the following study abroad trip designated by this name and/or course number, _____ in _____ from _____, 20__, to _____, 20__, sponsored by West Chester University of PA, fully release West Chester University of PA and the Pennsylvania State System of Higher Education ("PASSHE"), and their trustees, officers, agents, representatives, and employees, from all liability for any delays, inconveniences, accidents, expenses, or mishaps of any kind whatsoever. I understand that West Chester University of PA and PASSHE, and their trustees, officers, agents, representatives, and employees can accept no responsibility for losses or expenses due to delays, changes in air or other services, sickness, accidents, weather, strike, war, quarantine, or other causes. All such losses or expenses will be borne by me. Accordingly, and in consideration of my participation, I hereby agree to the following:

I have read the information herein and recognize and accept any risks thereof. I understand, and hereby agree, on behalf of myself, my dependents, heirs, executors, beneficiaries, successors, and assignees, to abide by the conditions set forth in this Release of Liability and hereby release and hold harmless West Chester University of PA, PASSHE, and any of their trustees, officers, employees, agents, or representatives from any and all liability arising out of or relating to my participation, however occurring, including injuries, death, delays, cancellation or loss or damage to property, and hereby indemnify West Chester University of PA and PASSHE, and its trustees, officers, employees, agents, or representatives from any liability for any claim of whatever nature and for whatever cause of action that arises out of my participation in the study abroad trip referenced above.

Dates of Travel
_____, 20____
Traveler Full Name (print) _____

Signed _____ Date_____

Parent or Guardian (if app.) Name (print)_____

Signed_____ Date_____

Each guest must submit an original copy of this signed form to Center for International Programs, McKelvie Hall, Room 302, West Chester University of PA.

Appendix B: Model Documents

MD-1: Preparation and Packing Model Document……..38

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MD-1

Preparation and Packing Model Document

[Proper preparation and packing can avoid problems and ensure the most productive academic and cultural experience. As with health preparations, packing plans depend upon specifics of the site, season, and travel conditions. It is recommended that all travelers be provided a checklist with explanatory information. Consult with previous travelers to the site, and with the Center for International Programs, to construct an appropriate and useful packing list. The following example illustrates some typical issues; revise and adapt for your study abroad specifics.]

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Amazon Center for Environmental Education and Research
PREPARATION & PACKING

THINGS TO DO BEFORE YOU LEAVE

___ Check right away to see if your passport will be valid at least six (6) months past your scheduled return. It's a good idea to make two copies, keep one in your carry-on and one in your suitcase.

___ Read the health information sheet and check with your physician or local travel health center for recommended health precautions at least 30 days before departure.

____ Have US currency in small denominations (no larger than a $50). Be sure the bills are not torn or marked in any way as they will not be accepted. US coins are not accepted. Major hotels will generally accept Visa and Mastercard. Keep in mind **expenses not covered in the cost of the trip**:

- Airport departure taxes – (for countries where charged) vary but approximately total $50-75 cash.
- Money for keepsakes and gifts- there will be opportunity to purchase textiles and other craftwork.
- Money for bottled water, if you are uncomfortable drinking the filtered water. At least two large bottles per day should be consumed.

___ Address labels on all baggage (inside and out). For the purpose of fast identification, please print name and address legibly on your baggage tags, last name first in capital letters.

___ Leave itinerary/contact information with relative or friend.
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HAVE IN YOUR CARRY-ON: (Do not pack in your suitcase)

___ Passport

___ Airline tickets/receipts (e-tickets are used, boarding passes are obtained at check-in)

___ Money and if desired, Visa or Mastercard

___ Water bottle (purchase **after** going through security check)

___ Sunglasses

___ Prescription medications (in sufficient quantities), Insulin-dependent diabetics are advised to carry an extra supply of insulin in their suitcases (or better, with a traveling partner)

___ Personal items (toiletries) and one day of clean clothing**

** Note: There are new regulations as to what you can carry on the plane:

With few exceptions for prescription and over-the-counter medicines, the following rules apply to all liquids, gels and aerosols carried through a security checkpoint:

1. All liquids, gels and aerosols must be in three-ounce or smaller containers. Large containers that are half-full or toothpaste tubes rolled up are not allowed in carryon. **Each container must be three ounces or smaller.**
2. All liquids, gels and aerosols must be placed in a single, quart size, zip-top, clear plastic bag. Gallon size bags or bags that are not zip-top are not allowed**. Each traveler can use only one quart size, zip-top, clear plastic bag.**
3. Each traveler must remove their quart-size plastic bag from their carry-on and place it in a bin or on the conveyor belt for x-ray screening. X-raying separately will allow TSA security officers to more easily examine the declared items.
4. **Declare larger liquids.** Prescription medicines, insulin, are allowed in quantities exceeding three ounces. Declare these items for inspection at checkpoint.

If you need larger amounts of liquids, gels and aerosols such as toothpaste or shampoo, please place them in your luggage (in a plastic bag in case of package damage) and check them with the airline.

If you have any questions, please visit the TSA website at**:**
www.tsa.gov/travelers/airtravel/prohibited/permitted-prohibited-items.shtm

Also, be aware that there are luggage restrictions for internal flights in _____. You can carry on a piece of luggage that weighs 8 kg, which is a little more than 16 lbs., maximum size 55 X 25 X 35 cm (that translates to . . . approximately 21 in. X 9.5 in. X 13.5 in.).

For checked luggage, it cannot weigh more than 25 kg -- a little more that 50 lbs. Anything over 25 kg, there will be an additional charge of $2.40 per kg, which the traveler will pay out of their pocket. No maximum size data specified.

ESSENTIAL THINGS TO TAKE:

___ Small general first aid kit including Band-Aids, favorite remedies for headaches, colds, upset stomach (Pepto-Bismol for traveler's diarrhea), nerves, motion sickness, insect bite relief, etc

___ Personal hygiene kit (soap, shampoo, toothbrush, personal toilet articles (feminine hygiene items are not easily accessible).

___ Insect repellent containing at least 28% DEET

___ Lightweight rain poncho

___ Small flashlight (with extra batteries in their own plastic bag)

___ Alarm clock

___ Assorted sized plastic bags (to keep separate wet and dry clothes).

___ Hat with a brim for sun protection (Hats that are easily blown off are not recommended).

___ Sunscreen (SPF 30 or higher), Chapstick / lip balm

___ Premoistened towelettes (very useful to keep hands clean before eating anything)

___ Plenty of batteries, or voltage adaptor for charging cameras and laptops

(voltage in _____ is ____ V

USEFUL EXTRAS TO MAKE TOURING EASIER

___ Tissue mini packs (especially handy in Peruvian airport restrooms)

___ Munchies (convenient during waits in airports or for in-between meals)

___ Bird books or other field guides (keep weight to a minimum).

___ Silica gel packets for keeping camera lens, film and binoculars dry and fungal free.

___ Journal and pen/pencil!!

___ The electricity in _____ is 220 but most major hotels have dual voltage available, at the camp there is a generator and adapters are generally kept on site. If you just bring a battery charger that ought to suffice.

CLOTHING/EQUIPMENT LIST AND IMPORTANT FACTS

CLOTHING- Since you are going to be moving through varying climates, the operative word for packing is layers. It is a good idea to pack everything into a large plastic bag (or a number of smaller ones) that would then act as a lining to your suitcase and carry-on to ensure that things stay dry.

Casual Clothes: for comfortable travel in cities and airplanes.

Shirts: cotton, short-sleeved or T-shirts, long sleeved.

Sweater or Jacket: Light wool or synthetic. A hooded windbreaker in combination with a light sweater can be extremely versatile and useful.

Trousers: cotton field pants. Shorts can be worn in most places. Note: Heavy clothes such as jeans will not dry in the tropics. Pants with bottoms that can be removed and converted into shorts are ideal.

Headgear: Light hat with wide brim for sun protection on the face and neck. Visors do not protect the top of your head.

Underwear: Cotton will be cooler than synthetics.

Bathing Suit: For use at lake and/or hot springs.

Sleepwear: A light robe or T-shirt type nightshirt would be appropriate.

Rain Poncho – lightweight but sturdy.

Socks: cotton, athletic (at least 1 or 2 pair per day)

Boots and Shoes: Rubber mud boots are provided at all the lodges for trail walking. You may prefer to bring a lightweight pair of hiking boots. At times trails can be quite muddy and slippery, shoes with non-slip soles and/or shallow treads are recommended. A pair of lightweight tennis shoes to be worn only in the camp areas (designated dry shoes).

Flip-flops may be desired for the showers. (05/19/08)

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MD-2

Health Information Model Document

[Health issues are variable depending on location, season, and conditions of travel. It is recommended that a checklist customized for site-specific conditions be constructed for each trip; the Center for International Programs (ext. 3515) can provide advice and help you customize a health information sheet to distribute to students and potential travelers. The following example of a health information sheet illustrates some typical issues.]

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Amazon Center for Environmental Education and Research

Health Information

As you prepare for your learning adventure in the Peruvian Amazon and Andes here is some health information to consider that will help assure that your experience is as rewarding and fulfilling as possible.

One of the most important things that you can do for yourself health-wise is to stay hydrated and this is best started on the outset of your trip. Even if you don't feel thirsty, small, frequent sips of water will go far in keeping you feeling good and on track! Although potable water is generally very readily available at all our venues, pack a couple bottles in your carry-on to drink along the way and in case our itinerary gets delayed anywhere. You will want to have bottled water with you most of the time, and you will be offered many opportunities to refill you personal containers. Tap water (even from the hot faucet) is **not** suitable for drinking or brushing your teeth/dentures**. If you are getting low on water and are not offered some – ASK!**

Tips for avoiding traveler's diarrhea (and other gastrointestinal conundrums) include:

- staying hydrated with bottled water
- remember that ice is a potential source of contamination
- avoid street vendors
- select fresh fruits that you can peel yourself
- wash your hands, especially before meals, carry a pack of hand wipes
- avoid overeating- you will be served wonderful meals at all the venues and participating in a lot of physical activity- pace yourself

If you do begin with gastrointestinal upset your first line of medicinal defense would be Pepto-Bismol. (Some people that are predisposed to this kind of issue will take a daily dose of Pepto-Bismol prophylactically). Lomotil, Imodium, Bactrim DS, Cipro are best reserved for the appropriate scenarios and emergencies.

Vaccines are a very individual decision that is best made after gathering enough information so that you are comfortable with your conclusion on this issue. Consult your personal primary care
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practitioner, a local travel health center, and visit the CDC's travel website to get an idea of some prophylactic measures and vaccines to consider. The following are the most common suggestions for travelers to tropical South America from the CDC site. See your doctor at least 4-6 weeks before your trip to allow times for shots to take effect. Please remember *these vaccines are not required, but are recommended:*

- Hepatitis A
- Hepatitis B
- Typhoid
- Tetanus (if you are not up to date)
- As needed boosters for tetanus-diphtheria and measles

✂ Yellow Fever

✂ Malaria Prophylaxis *(atovaquone/proguanil, doxycycline, mefloquine, or in special circumstances primaquine)*

✂- In the broader region around Puerto Maldonado, yellow fever and malaria are endemic but not to the specific areas where we typically visit.

Please visit the CDC Website for specific information on your destination, and speak with your physician:

http://www.cdc.gov/travel/regionalmalaria/tropsam.htm#malariarisk

Insect precautions:

- When visiting mosquito inhabited areas wear long sleeved shirts and pants to minimize the amount of exposed skin, especially from dusk to dawn.
- Use insect repellents which contain no more that 35% DEET. There are also essential oil based repellents that work well for some people.
- Note: All rainforest lodges employ mosquito netting around the beds to assure you insect-free sleep. Be sure you carefully re-tuck the netting after getting into bed.

Altitude sickness can be an issue when in the Andean highlands. Again, staying hydrated can help, pace your activity and avoid overindulging with alcohol. Some travelers opt for getting a prescription for **Diamox.** Also useful and very available in the area are dried coca leaves and mate de coca (coca tea), which can be purchased from vendors and offered at the hotels, respectively.

Be sure to pack all prescription medications (in sufficient quantities), along with personal items and one day of clean clothing in your carry-on.

Important notables to remember to pack: sunglasses, sunscreen (SPF 30 or higher), DEET bug repellant (at least 28% DEET), hat, chapstick, poncho, and a small general first aid kit.

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MD-3

Student Information for Home Stay Model Document

[Note: this model document is a form that must be adapted to match the needs and conditions of each study location, including attention to issues of sensitivity in local cultures (religion, contacts between sexes, food restrictions, schedule norms, transportation needs, etc.). In this matter as in all matters regarding study abroad, remember to consult the Center for International Programs (ext. 3515) for advice.]

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Study Abroad Project: Universidad Nacional, Heredia, Costa Rica
Host family form (to be filled out by the student)

Dear participant:

Please complete the following form in detail. Your answers will help the 'Host Family Department' to find a Costa Rican family that will meet your personal needs and preferences.

If you need to provide additional information, please use a separate sheet. Please return the following form as soon as possible; the deadline is ___________________. Include a recent photo of yourself, which will be given to your host family. You can place your photo at the end of this form.

NAME: ____

DATE: ____

E-MAIL ADDRESS: _______________________________________-

SEX: ____

AGE: ____

1. Most of the host families have children. Do you prefer to live with a family:
   a. With young children (teenagers or younger children). ________________.
   b. Adults or college students. ____________________.
   c. A family with no children. ____________________.
   d. It does not matter. _____________________.
~~~~~~

2. Most of the students will be placed with families who live in the surroundings of Heredia, most of them within walking distance. However, some students will have to take a 15-20 minute walk, or use the local bus. Is this a problem for you?

   a. Yes, it is problem. (Please explain). _____.

   b. No, a moderate walk, or a 10 minute trip on the bus is not a problem for me. _____.

3. Would you like to have a close relationship with the family, or do you prefer not to be included in the family activities/ outings? Explain. _____

_____.

4. Some members of the host families speak a little bit of English, some others do not speak English.

   A. PLEASE INDICATE YOUR PREFERENCE BELOW:

      a) I prefer to live with a family where English is not spoken._____

      b) I prefer a family where somebody speaks a little bit of English. _____

      c) I prefer a family where English is spoken at all times. _____.

5. Do you smoke?

   a. Yes _____

   b. No _____

6. Is having smokers in the host family a problem for you?

   a. Yes. (Explain.) _____.

   b. No. ____.

7. Do you have any health issues that require special attention? Please explain.

_____

_____.

8. Do you need to take medication on a regular basis?

a. Yes. (Please name the medications and the doctor's instructions.)

_____

_____.

b. No. ____

9. Is it a problem for you if the host family has pets?

a. Yes. (Explain.) _____.

b. No. ____.

10. Do you have any allergies? (to food, drinks, animals, etc.) Please explain.

_____.

11. How many meals do you eat a day?

a. Breakfast and dinner only _____

b. Breakfast and lunch only _____

c. Breakfast, lunch and dinner _____

d. Other _____(Explain)

12. Are you vegetarian?

a. Yes. (Explain requirements.) _____
_____.

b. No. ___.

13. Is there any type of food or drink you do not like or cannot tolerate?

a. Yes. (Explain.) _____.

b. No. ___.

14. Is there any thing about your daily routine that you would like to share (for instance, religion, hobbies, interests, etc.)? _____

_____

____.

15. What are some the goals you expect to achieve by living with a Costa Rican family?
    ____

____.

16. What some other aspects you would like us to take into account in order to find the most suitable host family for you? You may use an additional sheet if you want.
    ____

____.

17. Place your picture here.

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MD-4

Registration Model Document

[Note: This model document must be revised as appropriate for your specific study abroad trip. Special attention should be paid to the categories of information represented in this model document. It is recommended that you consult with the Center for International Programs as you devise the draft suited to your trip, to ensure that best practices in risk management are served by the information students and other travelers provide on the registration form.]

Amazon Center for Environmental Education and Research

Registration

RESERVATION CERTIFICATE

Workshop price is per person based on double occupancy. Check to be made out to: West Chester University of PA

I WOULD LIKE TO PARTICIPATE IN THE FOLLOWING STUDY TRIP:

FIELD STUDIES IN PERU – GEOLOGY AND ENVIRONMENTAL STUDIES OF THE AMAZON RAINFOREST AND THE ANDES
FEBRUARY 27TH – MARCH 8TH, 2009
($2,015 FROM LIMA)

DUE TO THE VOLATILITY OF FUEL PRICES, TRAVELERS WILL BE CHARGED ANY ADDITIONAL FEES LEVIED BY THE AIRLINES PRIOR TO TICKETING.

NAME (S) DR. ___ MR. ___ MRS. ___ MS. ___ _____
(PRINT FULL NAME AS IT APPEARS ON PASSPORT FOR EACH TRAVELER.)

ADDRESS _____

CITY _____ **STATE** _____ **ZIP** _____

HOME PHONE _____ **BUSINESS PHONE** _____

FAX _____ **E-MAIL** _____

PHONE NUMBER(S) PRIOR TO DEPARTURE _____

ACCOMMODATIONS

I WOULD LIKE TO SHARE A ROOM WITH_____

PLEASE ASSIGN A ROOMMATE. YES ___ NO ___

I DESIRE SINGLE ACCOMMODATIONS (LAND PORTION ONLY; SINGLE ACCOMMODATIONS ARE AVAILABLE FOR AN ADDITIONAL CHARGE OF $_____).
YES ___ NO ___

HOW DID YOU HEAR ABOUT THIS FIELD TRIP:
_____

METHOD OF PAYMENT
FINAL payment is due by check prior to trip departure date – FINAL PAYMENT DUE **December 19, 2008**
Please address checks to:

West Chester University of PA
Bursar's Office
P.O. Box _____
West Chester, PA 19383

INSURANCE
West Chester University REQUIRES **travelers to obtain Travel Insurance in case of trip delays, flight cancellations, luggage coverage, and health related issues. Some insurance Companies include pre-existing**
medical conditions. Contact your travel agent, or go to WWW.TRAVELGUARD.COM. or any other reputable insurance company. Please attach proof of insurances to this document.

Trip insurance is required. Please list name of company providing coverage and policy number:

_____
_____

I have received, read and accept the conditions of the General Information section, especially the Cancellation clause and the Responsibilities and Conditions paragraph on this form. I would like to make reservations for the person(s) listed above in accordance with the enclosed deposit. EACH PARTICIPANT MUST SIGN THIS WAIVER.

DATE _____ **SIGNATURE** _____

CANCELLATION POLICY: **All cancellations must be made in writing and are effective upon receipt in our office.**

The following fees apply and are per person:

$100 from time of booking to 90 days prior to departure

$350 from 89 to 61 days prior to departure

Full penalty from 60 to 0 days prior to departure

TRANSFERS: ARE SUBJECT TO THE SAME TERMS AS CANCELLATIONS

PERSONAL DATA FOR TRAVEL DOCUMENTS

PLEASE COMPLETE THE FOLLOWING INFORMATION FOR EACH PERSON.

NAME _____ **NICKNAME** _____

DATE OF BIRTH _____ **AGE** _____

NATIONALITY _____

PASSPORT NUMBER _____

OCCUPATION

_____

EMERGENCY CONTACT PERSON _____

PHONE NUMBER_____

RELATIONSHIP _____

Please specify dietary, physical needs, ALLERGIES and/or MEDICAL CONDITION THE STAFF SHOULD BE AWARE OF:_____

_____

_____

MD-5

Experience Abroad Evaluation Model Document

[Note: Faculty should provide evaluations of the course and of the study abroad experience. Such evaluations are crucial in ensuring that any possible problems or challenges are known and can be addressed prior to the repetition of any study abroad experience. Such evaluation forms must be customized appropriately for the course, the nature of in-country activities, and the specifics of the study abroad site itself. The following is an example of a form that faculty may use as a model to adapt appropriately. Completed assessments should be filed with the Center for International Programs no more than 14 days after trip completion. Faculty should also provide an evaluative summary of the study abroad experience to the Center for International Programs to keep on file as useful information and support for future study abroad offerings.]

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Amazon Center for Environmental Education and Research

EVALUATION SURVEY

Dear Workshop Attendees,
Now that you have returned from the workshop in _____, we would like to request your input on the experience.   I hope you will feel free to comment on the survey below *(please feel free to just give a numerical rating, or to include as many comments as you wish).* Feel free to mail, email or drop off the evaluation. **Email**: ___________________

Office: ________________

How would you rate the following?
Survey - scale of **1-(poor) 2 3 4 5-(average) 6 7 8 9 10-(fantastic)**

1. Your overall experience

Your overall experience in ______
Your overall experience in the region ______
Your overall experience in the city ______
How well prepared were you for this experience? _____

What would have been helpful to know ahead of time?
____

Would you recommend this trip to a friend? _____yes _____no

2. Travel throughout -----------

In-country flight arrangements/ticketing/boarding pass procedures _______
Bus Travel ______
Train Travel ______
Boat Travel ______
~~~~~~

Comments:

_____

_____

_____

3. Accommodations

The Hotel _____in _____

The Hotel _____ in _____

Comments:

_____

_____

4. Food - quantity and quality at the various locations

Boxed Lunch on_____

Meals at _____ _____ breakfast ____ lunch ____dinner

Boxed Lunch on bus to _____ _____

Buffet Lunch at the _____ _____

Would you have preferred to have all meals included, or some meals on your own?

_____All meals _____some meals

Comments:

_____

_____

5. Tour Guides

Rainforest Guides at _____ _____

Sports Travel guides

-at _____ _____

-at_____ _____

-at _____ _____

Comments:

_____

_____

_____

6. Academic experience [Note: faculty should administer QUICS when applicable]

Knowledge of professor _____

Quality of presentations _____

Visual Aids _____

Articles _____

Did you take this trip for course credit? _____yes _____no

If no, what interested you in this trip?

____

What is the most significant thing you learned during this trip?

____

____

7. Points of Interest

Visit to Town of (list all places) ________________ _____

________________ _____

________________ _____

________________ _____

Folklore Show in ___________ _____

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Appendix C: Checklists

C-1: Checklist of Required Procedures……..…….55

C-2: Foreign Travel Discussion Points with Finance and Business Service ……...57

Appendix C-1

Checklist of Required Procedures

Information and equipment to obtain

1. ___Informational and procedural briefing, with discussion of risk management specific to your course and site, has been held with Center for International Programs (CIP).
2. ___Copy of *Designing and Leading International Study Programs: Risk Management and Best Practices for WCU Faculty* has been received from CIP and read.
3. ___Appropriate communications equipment has been obtained for the duration of the trip.
4. ___Individuals listed in Communications Chain Form have appropriate communications equipment for use in emergencies.
5. ___Lodgings have been investigated for quality, appropriateness, and cleanliness.
6. ___Financial arrangements for travel and lodgings have been carried out in accordance with WCU and PASSHE fiscal and contractual policies
7. ___Host families, and home stay sites, if utilized, meet minimum requirements as described in this guide and have been vetted through appropriate background checks, according to procedures in consultation with CIP; and documentation summarizing such vetting has been filed with CIP.
8. ___Students have been vetted for home stays with host families.
9. ___Faculty trip leader knows local requirements of telecommunications in host country, such as country codes.
10. ___Bidding and procurement procedures (if applicable) have been conducted in accordance with West Chester University of PA and Pennsylvania State System of Higher Education (PASSHE) requirements, and/or conducted in consultation with Purchasing and Contract Services, including appropriate use of Service Purchase Contracts, or Purchase Orders.

Orientation and briefing information to prepare

11. ___Health safety preparations and procedures have been explained in writing, distributed in writing, and will be discussed in pre-travel orientations and briefings.
12. ___Alcohol use and expectations of personal responsibility and safety have been explained in writing, distributed in writing, and will be discussed in pre-travel orientations and briefings.
13. ___Students have been provided written directions for problem-solving during home stays (if applicable), including emergency contact numbers, access to communication, and name of an on-site problem-solving authority (such as a professor familiar with the local language and culture).
14. ___Travel and health insurance requirements have been explained in written materials, distributed, and discussed in pre-travel orientations and briefings.
15. ___Pre-travel orientation or briefing session has been scheduled, to provide both written information and opportunity for discussion of: itinerary; course costs; academic

requirements and/or syllabus; cultural introduction; health and insurance requirements; visa requirements; and related trip information.

16. ___Refund policy, in case of cancellation, has been established in consultation with CIP, and has been provided in writing.
17. ___Students have been advised, in pre-travel orientations and briefing sessions, of requirements of the West Chester University Student Code of Conduct; and a copy of the Code has been provided in writing or online at http://www.wcupa.edu/_services/stu.jud/Documents/08-09%20Code%20of%20Conduct.pdf.

Forms and documents to access, complete, and file

18. ___Request for Faculty-Led Study Abroad Form (SA-1) completed.
19. ___Risk Management Form (SA-2) completed.
20. ___Memorandum of Agreement has been established and vetted through Office of the Provost and/or Director of Global Development Collaborative.
21. ___Support Services and Contractor Information Form (SA-3) has been completed and filed with CIP, verifying established travel services and established companies.
22. ___Communications Chain Form (SA-4) has been completed and filed with CIP and the Office of the Provost.
23. ___Emergency Contact Information Form (SA-5) has been completed and filed with CIP and the Office of the Provost.
24. ___Documentation summarizing vetting of host families and appropriate student matching for home stays (such as Model Document MD-3) has been filed with CIP.
25. ___Travel and health insurance policy information for each traveler has been documented through registration materials (see Registration Model Document, MD-4) and filed with CIP.
26. ___Liability Form (SA-6) has been completed by faculty and all students, and filed with CIP.
27. ___Recognition of Risk Form (SA-7) has been completed by faculty and all students, and filed with CIP.
28. ___Students' emergency contact information, including telephone, fax, and email addresses (see Registration Model Document MD-4) is complete and in possession of faculty trip leader.
29. ___Students under 18 years of age have had necessary signatures provided by parents or legal guardians, especially on the Recognition of Risk Form (SA-6); on the Liability Release Form (SA-7); and on an appropriate Registration Form adapted from Model Document MD-4.
30. ___Purchases relating to international travel have received approval of Office of the President, as appropriate, prior to execution of contracts.
31. ___Advance Travel Authorization Form (including, if applicable, request for cash advance) has been submitted to the Office of the President for approval; and traveler recognizes requirement for Travel Expense Voucher to be filed within 14 days of completion of travel.

Note: The Center for International Programs may institute additional procedures required for your specific study abroad program or project, based upon your program or project's location or activities.

Appendix C-2

Foreign Travel Discussion Points with Finance and Business Services

1. Prepare an Advance Travel Authorization form and obtain department and presidential authorizations. Forward the completed form to Accounts Payable a minimum of 4 months in advance of travel.
2. Establish a cost center to house any collected funds
3. Provide summary details of your trip
    a. List all travelers and their association with the university
    b. Provide a justification of how the trip pertains to university business
        i. If course credit is being given, provide program details
    c. Provide dates of departure and return
    d. Provide a detailed itinerary
    e. Provide a detail breakdown of "estimated" expenses
        i. Airfare
        ii. Hotel
        iii. Meals
        iv. Miscellaneous
    f. Is a travel card or cash advance needed?
        i. Apply for a Travel Card to assist in paying and converting foreign funds for as many expenses as possible in order to limit the actual amount of cash being carried.
        ii. Complete the Advance Travel Authorization form for any advance monies needed
    g. Receipts for expenses are REQUIRED for all expenditures.
    h. A daily log should be kept for all out of pocket expense. If funds are given to students or another member on the trip, the exchange must be noted and a signature of receiving party is needed.
    i. All expenses must be converted to US dollars for final submission and audit on a Travel Expense Voucher within 14 days of completion of the trip.