

A photograph of a person with long dark hair, wearing a light green jacket and dark pants, standing on a large, dark rock. Their arms are outstretched to the sides, facing a large, multi-tiered waterfall. The water is white and cascading down the rock face. The background is a dense forest of green trees under a slightly overcast sky.

# **HANDBOOK for FACULTY-LED STUDY ABROAD & STUDY AWAY PROGRAMS**

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**CENTER FOR INTERNATIONAL EDUCATION ABROAD  
TRUMAN STATE UNIVERSITY**

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*“Simple exchanges  
can break down  
walls between us, for  
when people come  
together and speak  
to one another and  
share a common  
experience, then their  
common humanity is  
revealed.”*

*President Barack  
Obama*

## **Dear Faculty and Staff,**

Thank you for making the choice to commit your time and energy to providing a high quality, innovative study abroad or study away experience for students. The decision to lead a Truman State University faculty-led program provides an opportunity to engage students in a way that is not possible in a classroom on campus. In this role, you will have more responsibilities than in a traditional on-campus course; you are accepting the challenge of serving as an administrator, an advisor, a facilitator, a first-responder, and of course, an educator.

While on the program, you will observe a broadening of student perspectives and an expansion of minds engaging in the learning process. You will facilitate not only classroom-based learning, but also the development of intercultural competencies.

This handbook is meant to be a guide and reference as you navigate the process of planning a faculty-led program with students, and our CIEA staff are always available to assist in the process. Thank you again for your commitment and contributions in providing this transformational experience to our students.

*Study Abroad Staff  
Center for International Education Abroad*

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### 0.1: Overview of Faculty-Led Programs

#### 0.1.1: Definition of a Faculty-Led Program

A faculty-led program is a credit-bearing academic course or group of related courses taught off campus for all or most of the duration of the program, designed to capitalize on unique experiential learning opportunities arising from the program site. Truman State University's faculty-led programs are proposed and led by Truman faculty members or contracted instructors, sponsored by an academic department and its school, budgeted and administered through Truman's Center for International Education Abroad (CIEA), and approved by the Executive Director for International Education and the Vice President for Academic Affairs and Provost. Historically, most faculty-led programs have been conducted as "study abroad" programs, but CIEA now also administers domestic "study away" programs,<sup>1</sup> as well.

#### 0.1.2: Why Instructors Choose to Lead Faculty-Led Programs

Leadership of a Truman faculty-led program is both challenging and rewarding. Leaders frequently report transformational experiences with students as they connect with them outside of their comfort zone and mentor them through a unique and intense travel experience. Leaders have a lasting impact, as their programs shape students well beyond their time at Truman. CIEA seeks leaders who are intrinsically motivated by these rewards and who are ready to devote the time and energy necessary to plan, prepare, teach, and guide students through these experiences.

#### 0.1.3: Why Students Choose Faculty-Led Programs

Historically, faculty-led programs have been the most popular way for Truman students to experience study abroad. There are many reasons for the popularity of faculty-led programs, including:

- *Interest in a Truman-sponsored program.* In uncertain times, some students prefer things that feel safe and familiar, like Truman. Participating in a Truman program can be comforting for parents and students alike, because they feel assured of the same quality teaching experience the student would have received on campus and reassured by the support of CIEA throughout the program cycle.
- *Interest in a pre-planned program.* Many students want the independence of being abroad or in a new location, but may find an independent immersion for an entire semester daunting. Current trends in US study abroad show students are increasingly selecting highly structured programs.
- *Interest in a particular course and the applicability of the credits received towards degree requirements.* Students are increasingly concerned about how study abroad or study away experiences count towards completing tight 4-year plans. Offerings that count towards general education requirements or a wider range of major or minor credits can also help attract a wider group of students to courses.
- *Interest or trust in a particular Truman faculty member.* Students are highly motivated to travel with an instructor they already trust or know to be an outstanding teacher, based on either experience or reputation.

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<sup>1</sup> International and domestic programs have much in common both academically and logistically. Since the majority of past programs have been international, the *Faculty-Led Handbook* may provide some information that will not apply to domestic programs. However, the policies contained in this document apply to study away programs unless otherwise noted in footnotes throughout.

#### 0.1.4: Elements of a Successful Program

Successful faculty-led program proposals address the following criteria:<sup>2</sup>

- *Safety*: Does the proposed destination pose any safety issues for participants? (e.g. Are there US State Department travel advisories? Is there access to medical care?) Are safety concerns adequately addressed in the proposal?
- *Sustainability/Enrollment Potential*: What is the potential population of students who can enroll in this program? Is this program open to all students? Can the program be rotated among faculty? Is this an interdepartmental program?
- *Academic Rigor/Educational Value*: Do the credits offered fulfill degree requirements? Does the course offer sufficient academic rigor to meet Truman State University standards?
- *Cost Recovery*: Does the specific proposal have a high likelihood of generating revenues sufficient to sustain the necessary marketing, promotion, program development and contingency funds?
- *Affordability*: Is the program offered at a price that is affordable for Truman students? Are included expenses justified by academic need?
- *Preferred Instructor Background*: Does the instructor have the ability to recruit students to enroll in the program? Does the instructor have experience living/working/traveling abroad, particularly in the country of destination, or have off-campus instructional experiences? Is the instructor willing and capable of handling emergency situations abroad?
- *Uniqueness*: Does the program offer a unique educational experience that is likely to attract students? How does it fit with other faculty-led programs being offered?
- *Administrative Considerations*: How much administrative work will be needed to prepare and administer this course? How will the administration of this program fit into the workload of CIEA?

#### 0.1.5: Program Types

At Truman, faculty-led programs are separated into two categories, distinguished by the following features:<sup>3</sup>

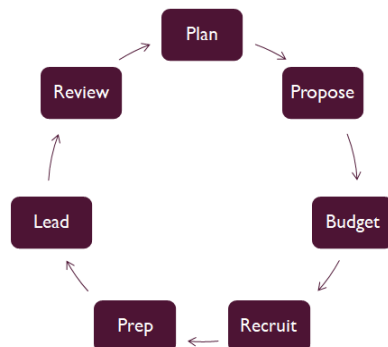
- Short-Term Faculty-Led Programs
  - One integrated class for 3-6 credits (6 credit courses may also be offered as 2 separate three-credit courses which are mutually reinforcing)
  - Conducted over a period of 9-45 days
  - Typically designed for 1 Truman instructor
  - Target enrollments of 12-20 students
- Extended Faculty-Led Programs
  - Multiple classes (3-4) for 9-12 credits
  - Conducted over a period of 45-60 days
  - Designed for 2 Truman instructors
  - Target enrollments of 18-30 students

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<sup>2</sup> For more information about the proposal process, see Phase Two: Propose

<sup>3</sup> See Phase One: Plan for more information about program design

## 0.2: Planning Overview



Leadership of faculty-led programs involves ongoing work throughout the year, though certain periods will be more intensive than others and the work of planning typically decreases with each successive iteration. The administration of a single iteration of a program typically occurs over a period of 20-24 months. Leaders who intend to run iterations of their program every year should expect to be attending to aspects of two iterations of their program simultaneously at times. The following list provides a brief overview of the planning and execution process that will be explained in greater detail throughout this *Handbook*:<sup>4</sup>

- Plan (30 to 18 months ahead; through Nov. of prior academic year)
  - Dreaming, brainstorming, consultation with CIEA and department, reading the *Faculty-Led Handbook*, drafting syllabus/itinerary, researching locations, opportunities, partnerships
- Propose (21 to 15 months ahead; Aug to Feb. of prior academic year)
  - Complete and submit program proposal including completed draft syllabus/itinerary;<sup>5</sup> Receive comments from review panel, make modifications/edits of plans, complete approval documents with chair and dean; Receive program approval (new programs must also be approved by faculty governance)
- Budget (16 to 10 months ahead; Jan. to July of prior academic year)
  - work with CIEA on developing budget and partnerships/plans, finalize all program documents, including syllabus/itinerary, application documents, pricing, etc. to the extent possible
- Recruit (15 to 3 months ahead; Feb. of prior academic year to Feb. of same academic year)
  - Develop promotional plan and materials, attend CIEA's Recruitment Training, begin marketing program to potential participants; continue program planning as needed, review and approve applicants
- Prep (4 months ahead to departure; Jan. to May/June of same academic year)
  - Pre-departure meetings, payments to vendors, final prep, attend CIEA's Emergency Training
- Lead
  - Execute planned program, deliver academic content, respond to emergencies, lead the group
- Review (return to 1 month after)
  - Debrief with group and CIEA; complete grades and expense reports

<sup>4</sup> The dates given here are typical of May Interim/Summer Term programs. Winter Interim programs will have a similar, though truncated form of this timeline: inception, proposal, planning and approval stages will occur at the times noted, but planning will need to move along at a faster pace. Additionally, Winter Interim programs require a more aggressive recruitment that begins with the launch the previous year and completes early in the fall so that the preparation of the group can occur October through December ahead of the Winter Interim term.

<sup>5</sup> Precise proposal deadlines and review dates will be released when a call for proposals is issued, but generally calls will be issued around the start of the fall semester and due some time in November.



All of these aspects of planning are explained in greater detail in the following sections of this *Faculty-Led Handbook* (referenced as the *Handbook* throughout this document). The final phases (recruit, prep, lead, review) are all addressed in chronological order; however, the earlier stages of planning (plan, propose, and budget) are detailed according to several important processes that occur somewhat simultaneously in the early stages of the program. Each section of the *Handbook* also includes two checklists showing how responsibilities are divided between the Program Director and the Study Abroad Coordinator for each phase of the program. Faculty members interested in proposing and leading a program are advised to review the *Handbook* and reach out to CIEA 30-18 months ahead of their proposed program dates for a discussion.

### 0.3: Roles and Responsibilities

Faculty-led study abroad programs occur through the collaboration of many people and units of Truman State University: the program leaders, the sponsoring department and school, CIEA and the Coordinator for faculty-led programs, and various administrative units of the University (the business office, accounts payable, student accounts, the Foundation, the registrar, and financial aid). In addition to University units, successful program administration often also depends on collaboration with external partners, such as vendors, foreign universities, and community partnerships. Administration of these programs goes more smoothly when everyone has an understanding and appreciation for the various roles each unit plays.

#### 0.3.1: Leadership Roles

Faculty-led study abroad and study away programs may involve a range of leadership structures that will be negotiated between CIEA and the faculty who proposes the program. However, every program must have either one designated “Program Director” or two co-leaders who are both designated as a “Program Director.” In most cases, faculty-led programs are run exclusively by either one or two Program Directors; however, if a faculty member proposing a program believes their program will require additional leadership, they may propose an additional leader or leaders to be employed as “Program Assistant(s)” subject to the approval of CIEA.<sup>6</sup>

Regardless of a program’s leadership structure, Program Directors have primary responsibility for ensuring the successful execution of any faculty-led program and are the designated contact points for CIEA. However, there are also general expectations CIEA has of all its leaders, including any Program Assistants. Throughout this document, when the role of “Program Director” or “Program Assistant” is not specifically mentioned, the general term “program leader(s)” refers to both Program Directors and Assistants.

##### 0.3.1.1: Program Director Role

The role of a Program Director on a Truman faculty-led program goes well beyond “teaching activities” with students. Program Directors are also responsible for the welfare of the students outside of the classroom during the course and many administrative tasks. The job of a Program Director is a year-round task, especially for those who run programs every year—from proposals and planning to promotion and recruitment, pre-departure preparations, leading abroad, and concluding the course upon return.

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<sup>6</sup> For more information about leadership structures, see section 1.3.1: Leadership

Some of the most important functions of this position include:

- *Course designer*: develop a course plan that establishes the academic requirements and standards of the traditional syllabus while weaving these together with activities, visits, educational experiences and other learning opportunities in the host country.
- *Travel leader*: keep the group moving through the daily itinerary and syllabus, be responsible on site for ensuring that arrangements are carried out, addressing host country issues and host country personnel, and managing the logistics of travel.
- *Advisor-facilitator*: provide leadership for students, prepare students for departure and post-travel processing of the experience, deal with student-traveler issues, and act as an intercultural facilitator for students within the host culture. In some cases, serve as arbiter in case of disputes or disagreements involving students, faculty, host personnel, and host families.
- *Recruiter*: have primary responsibility for recruiting students into the program with general assistance from CIEA. Program leaders are expected to make a commitment to recruiting their program to the best of their abilities and to the greatest number of students possible.
- *Financial manager*: work with CIEA to develop a program budget and manage it on the road; make in-country payments and account for all expenditures.
- *Crisis and Risk Manager*: advise the group against risk and respond to any emergencies that arise. In the event of emergencies, the Program Director must maintain composure, use good judgment and make effective communications, maintain careful records, and make necessary interventions to ensure the safety and well-being of students in collaboration with CIEA.
- *Institutional representative*: communicate with awareness of liability issues, be a liaison for Truman State University, establish relations and build connections for the students to the host culture, orient host-site guest speakers, establish and maintain institutional relationships with host country or location counterparts, work with tour providers, and ensure institutional policies are followed.
- *Student affairs*: while abroad, be “on call” around the clock, assist students travelling abroad for the first time, dealing with homesickness, culture shock, or adaptation issues, respond to disciplinary issues and attend to various social dynamics in the group that interfere with the program experience.
- *Co-director (for some)*: establish expectations around how Program Director duties will be divided and shared early in the planning process, communicate and work together with respect, check-in regularly during the program, and discuss the individual welfare of students and course progress.

#### 0.3.1.2: Characteristics of a Successful Program Director

The efforts of the Program Director(s) are a key factor in the success of a faculty-led study abroad program. In identifying and selecting leaders for faculty-led study abroad programs, CIEA looks for the following markers of successful program leadership:

- *Organized*: Possesses strong administrative and organizational skills, can be responsible with University funds
- *Good recruiter*: Entrepreneurial, self-motivated, enthusiastic about their program and plans; commitment to a good faith effort to recruit participants and fully enroll the course
- *Professional*: Keeps appropriate boundaries and professionalism with students in informal settings, comfortable setting firm boundaries and taking disciplinary action when needed
- *Mature*: Comfortable taking responsibility for the health and safety of the group and responding to emergencies in accordance with Truman policy; able to take charge in moments of crisis

- *Available:* Support of department chair and dean for both the program and the time commitment needed to lead; willing to commit the time needed for a successful program, responsive to program development, administration, and CIEA correspondence throughout all phases of the course, including during the summer
- *Good with students:* Reputation for instructional excellence and high student trust; enjoys working with students, giving and caring on both an academic and personal level; appreciative of the increased contact with student that is inevitable during these programs
- *Academic/Location Experience:* Appropriate academic credentials for the proposed content of the course; experience in the host country or location and capacity in the native language are desirable wherever possible (local guides should be used when this is not the case)
- *Flexible:* Good humored and relaxed in the face of setbacks, changes, and unforeseen circumstances, which are part and parcel of international travel and faculty-led programs
- *Healthy:* Good health, ability to handle the physical and emotional demands of coordinating the details of the program and leading the program abroad

### 0.3.1.3: Program Assistant Role

Program Directors may include one or more compensated or uncompensated Program Assistants in the proposed leadership structure of a program. This request will be reviewed and considered on the basis of the Program Assistant's defined duties and cost to the program. Program Assistants may fulfill a variety of roles, but generally their job is to assist the Program Directors in carrying out their duties. Whenever Program Assistants are hired for a faculty-led program, they must be capable of substantially taking over group management from the Program Director in the event that she or he is incapacitated. As such, Program Assistants should in most cases possess similar qualities as Program Directors, especially with regards to maturity, flexibility, and health. When a Program Assistant is proposed, their job description must be clearly articulated in advance and approved by CIEA who can advise on the contractual process for their hiring in collaboration with Human Resources. Program Assistants are expected to be responsive to the leadership of Program Directors and CIEA. They are also required to participate in CIEA's emergency training for leaders<sup>7</sup> and should also be involved in at least the two required pre-departure meetings required for program participants so that the group is familiar with the leader before travelling.

### 0.3.2: Study Abroad Office (CIEA) Role

The Center for International Education Abroad (CIEA) has primary responsibility for overseeing the successful budgeting, administration, and execution of all faculty-led programs in accordance with Truman policy. The Coordinator for Faculty-Led Programs (referred to as the Coordinator throughout this document) has the primary responsibility for CIEA's role in faculty-led programs under the direction of the Executive Director for International Education. The Coordinator (with CIEA) fulfills the following essential functions:

- *Administration:* Determines faculty-led study abroad program policies, procedures, and deadlines with the approval of the Vice President for Academic Affairs and Provost; acts as the liaison between program leaders and administrative units of Truman, especially the Business Office.
- *Program Development:* Works with faculty, departments, and schools to encourage the ongoing development of new and returning proposals and program leaders; guides and cooperates with Program Directors and departments to develop and design proposals, complete approval steps, and

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<sup>7</sup> For more information on pre-departure emergency resources and training, see Phase Five: Prep

- finalize program planning
- *Proposal Review*: Convenes the proposal review panel to vet program proposals and leaders and offer guidance and advice for further program development
- *Partnerships/Contracts*: Establishes and/or facilitates relationships with third-party providers, universities, and local partners who can provide assistance and travel logistics for faculty-led programs (including working with the Business Office to properly request proposals, vet, and develop contracts with such partners)
- *Leader Training*: Provides essential materials, including the *Faculty-led Handbook*, one-on-one coaching, and CIEA's two required leadership training sessions to prepare program leaders
- *Budgeting/Finances*: Creates and oversees the budget and all expenses associated with faculty-led programs in cooperation with Program Directors and the Business Office, ensures and approves all payments related to programs, assists Program Directors in applying for University procurement cards (P-Cards); publishes official pricing for students to course website
- *Advising/Applications*: Offers general assistance and advising to students interested in studying abroad and maintains the application system for faculty-led study abroad programs; coordinates the collection of all administratively required documents, information, and waivers from students
- *Scholarships/Financial Aid*: Facilitates and oversees the award of Foundation Scholarships for study abroad in cooperation with the Truman Foundation and relevant departments for particular scholarships; provides paperwork and general guidance on financial aid to students (including instruction to consult directly with the Financial Aid Office)
- *Student Enrollment*: Ensures the registration, billing, and grading of enrolled participants in cooperation with Student Accounts, the Office of the Registrar, and the Financial Aid Office; ensures all students are enrolled in international travel and health insurance (through CISI)
- *Marketing/Recruitment*: Creates general marketing materials for faculty-led programs, including a website for each program, promotes faculty-led programs in general, and provides additional marketing assistance as requested
- *Pre-Departure*: Ensures the communication of essential health and safety information during group pre-departure sessions; available generally upon request to Program Directors for additional assistance as groups are prepared for departure
- *Emergencies*: Collects and distributes all necessary emergency information and contacts to Program Directors before departure; available to Program Directors 24/7 while groups are abroad for assistance, especially in case of emergencies
- *Wrap-Up*: Facilitates program conclusion, collects evaluations, and debriefs Program Directors

### 0.3.3: Proposal Review Panel Role

In the fall semester each year, the Executive Director for International Education will issue a call for proposals for faculty-led programs for the following academic year, including both new proposals and the renewal of existing proposals. Proposals will generally be due around 2-3 months after the call for proposals is first issued, to give faculty adequate time to prepare a proposal. However, faculty are welcome to work with CIEA on proposal ideas for future terms even prior to the official call for proposals. After proposals have been gathered, the Executive Director will convene a panel, made up of various administrators and faculty, to review the proposals that have been received. Proposals will be reviewed based on the criteria contained above under the heading "Elements of a Successful Proposal."<sup>8</sup> The review panel will then offer recommendations regarding whether a proposal should be provisionally approved for further development,

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<sup>8</sup> Section 0.1.4: Elements of a Successful Proposal

and offer specific recommendations about how the proposal could or must be strengthened or amended. CIEA will then follow up with those who have submitted proposals and their chairs or deans, as needed. Programs that are provisionally approved for further development will then proceed to making any necessary adjustments before approval paperwork is drafted for department sponsorship.<sup>9</sup>

#### 0.3.4: Department and School Roles

Faculty-led programs require sponsorship by one or more academic departments and the dean(s) of the associated school(s). Sponsorship is confirmed by the signature of the chair and dean of a department on the approval paperwork for the program. The academic department of which the Program Director or Directors are faculty members or instructors must be the sponsoring department. Department sponsorship means:

- The chair of the department and dean of the school support the commitment of their faculty member or instructor to the effort involved in developing and leading the program
- The chair of the department and dean of the school support the designated Program Director as having sufficient qualities to be successful in running the proposed program
- The department is committed to the long-term success of the program, including its continuation through any necessary change in leadership
- The department and school approve of the academic content and design of the course as sufficient to meet the standards of the department and Truman State University
- The department and school commit to supporting recruitment efforts and promotion of the program through department events, announcements, and faculty support

Sponsorship paperwork will also include a form for the pre-approval of any degree fulfillments sought for the program. This form must be signed by the relevant signatories (in most cases the chair) of any departments pre-approving credit for the course. These pre-approved degree fulfillments will be advertised on promotional materials for the program once it has received administrative approval.

#### 0.3.5: Business Office and Other Administrative Roles

Faculty-led study abroad programs are possible due to the efforts of many administrators working behind the scenes in the Business Office, the Office of the Registrar, the Financial Aid Office, and the Truman Foundation. Various staff members in these offices work with the Coordinator in accordance with their regular duties in order to complete a variety of administrative tasks, including: advising students regarding payments and financial aid, distributing financial aid, taking student payments, enrolling students in courses and registering their grades, ensuring sound business arrangements with partners, ensuring timely payments and purchases for programs, and reconciling program budgets. Generally, both Program Directors and administrators should work with the Coordinator when administrative issues arise, as the Coordinator is uniquely positioned to view the whole picture of program coordination. Program Directors should work with the Coordinator and not approach other administrative offices directly regarding their programs unless specifically directed by the Coordinator to do so. This ensures that the Coordinator is kept in the loop on all communications and also simplifies coordination for the other administrative offices who have only one point of contact for all faculty-led programs.

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<sup>9</sup> For more information on the review process, see section 2.3: Review Panel: Criteria and Considerations

### 0.3.6: Third-Party Roles

In addition to those working on faculty-led programs at Truman, programs often also rely on third-parties, local partners, and university partnerships in order to plan and execute programs. In some cases these relationships also involve the provision of on-site leaders, including instructors, local guides, tour leaders, guest speakers, host families, transportation providers, etc. All third-party providers are expected to uphold the same high standards and professionalism that are articulated in this document for Truman's own leaders. During planning, all third party providers must be properly vetted in accordance with CIEA and Business Office policies based on the extent of the services they will provide. Important areas to explore with these partners include: their own vetting and hiring processes, safety, health, and risk management experiences, their own emergency procedures, insurance and liability coverage, etc. During the program itself, it is the Program Director's responsibility to ensure that third-party leaders deliver services in accordance with established expectations and contracts and conduct themselves in ways that do not place the group at risk.<sup>10</sup>

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<sup>10</sup> For more information about work with third-party vendors see section 3.6.1: Working with Third-Party Vendors

## PHASE ONE | PLAN

An outstanding faculty-led program begins with a great initial design. The following section explore the whole range of considerations involved in program design—from academics to logistics and safety. The section above, “Introduction to Faculty-Led Programs” specified elements of a successful program: safety, sustainability, academic rigor, cost recovery, affordability, preferred instructor background, uniqueness, and administrative considerations. This section will walk Program Directors through many of the decisions involved in creating programs with these elements. Then the next section, “Phase Two: Propose” will explain how to turn a carefully considered program into a successful proposal. Leaders are also advised to consult with the Coordinator and solicit feedback from a range of others as they plan: colleagues and other faculty, leaders of other programs at Truman or similar programs at other institutions, third-party providers and foreign institutions, potential local partners, etc.



## Checklists for Phase One: Plan

### For Program Directors

- Design a program with full consideration of all components:
  - Academics
    - Select learning objectives, activities, and assignments
    - Determine pre-requisites, degree fulfillments, and number of credits
  - Itinerary
    - Determine tentative program dates, locations, and a flow of excursions and activities
  - Logistics
    - Draft a list of logistical needs, including: airfare and in-country travel plans, lodging arrangements, additional facilities or services needed, and meal plans
    - Consult with CIEA Coordinator regarding how logistical arrangements should be made and contracts secured
    - Consider technologies and arrangements available for a direct line of communication with CIEA while in-country
  - Group
    - Consider and select a leadership structure for your program and class size targets in consultation with CIEA
  - Safety
    - Review all arrangements with an eye to their health and safety implications for the group in consultation with CIEA
- Produce an integrated syllabus with all required components to submit with program proposal

### For Study Abroad Coordinator

- Provide Program Directors with the *Faculty-Led Handbook*
- Meet with Program Director as requested to assist with design, planning, and the creation of required course documents
- Review program plans developed by the Program Director and coordinate on further arrangements and contracts needed, including:
  - Academic plans for the program
  - Flow and make up of the itinerary for the program
  - Logistical needs and proposed arrangements
  - Plans for leadership and group structure
  - Health, safety and liability implications of all planned activities and locations
  - Proper vetting of any partners and contract arrangements



## 1.1: Academic Design

In designing a faculty-led study abroad program, program leaders will need to craft an integrated syllabus<sup>11</sup> interweaving an academic plan with a travel itinerary (recommended) or a separate syllabus and itinerary. To prepare this document, leaders will need to:

- Consider the opportunities and challenges unique to faculty-led programs
- Create an intentional plan to fulfill the Intercultural Perspective requirement<sup>12</sup>
- Choose additional specific course objectives that can be well integrated with the chosen site
- Select appropriate sites, events, activities, and academic components that fulfill course objectives
- Design course assignments and clear evaluative expectations
- Create an itinerary balancing teaching, activities, and time for processing and rest
- Suggest an appropriate number of credits for the program
- Set prerequisites appropriate to fulfilling the course objectives
- Propose pre-approved degree fulfillments attractive to a wide pool of applicants
- Draft the required course documents with a variety of end users in mind<sup>13</sup>

### 1.1.1: Course Documents and Users

Faculty-led programs require that academic components be well integrated with a travel itinerary. Program Directors may submit a separate syllabus and itinerary as a part of the course proposal, but we highly recommend using the integrated syllabus format<sup>14</sup> in which academic and itinerary components are interwoven. This approach has many advantages which help the Program Director, students, Coordinator, and other end users easily observe how all the various pieces of the course work together. A highly detailed, integrated syllabus helps to establish clear expectations for students interested in the course and helps the instructor to draw clear connections between events on the itinerary and the academic goals of the program.

With either approach, however, course documents are expected to be as detailed as possible. Each component of a program involves not only expectations for student and instructor, but important logistical details that must be understood by academic administrators, CIEA, the Business Office, and foreign or domestic partners. These additional end users will be using course documents in order to evaluate the academic rigor of the course, the extent of planning and organization required, budgeting issues, and issues of health, risk, and safety.

### 1.1.2: Integrated Syllabus

Faculty-led programs involve much more than simply teaching in an off-campus location. With our faculty-led programs we seek programs that create highly integrated and experiential learning in an off-site context, drawing richly and deeply on local resources, experts, and opportunities. On-site experiences add value by validating, enhancing, and sometimes even critiquing academic content. The best programs clearly integrate the academic content of the course with on-site experiences.

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<sup>11</sup> A sample integrated syllabus with explanatory notes and an integrated syllabus template can both be found on the “Resources for Faculty” page of Truman’s Study Abroad webpage: <https://studyabroad.truman.edu/faculty>

<sup>12</sup> Optional for domestic programs

<sup>13</sup> As outlined in section 0.3: Roles and Responsibilities

<sup>14</sup> See footnote 11

Unlike traditional course syllabi, faculty-led course syllabi should clearly document these points of integration. Using an “integrated syllabus”, which combines the syllabus and itinerary into one interwoven document, is one of the best ways to correlate academic content and goals with the itinerary and events of the program.<sup>15</sup> A good integrated syllabus specifically connects how each day’s activities integrate with the learning outcomes of the course and the academic content assigned for each day, whether by designating which learning outcomes will be met by each day’s activities or incorporating a brief paragraph articulating the learning goal for each day as it corresponds with that day’s readings, lectures, and experiences.

Faculty-led program syllabi should contain the following elements:

- Basic program information (course title and number, term and course dates, pre-approved degree fulfillments and prerequisites, program leaders and their contact information, and the catalog course description)
- Study abroad information (study abroad application and acceptance requirements, CIEA contact information, and the course website)
- A comprehensive program overview in addition to the catalog course description that narrates the union of academic course themes and the program itinerary
- Learning objectives in keeping with general Truman syllabus requirements. Learning objectives must be included to meet the Intercultural Perspective requirement (see more in section 1.1.5 on the Intercultural Perspective).
- Listing of required readings, assignments, papers, etc. to be used as the basis for the course grading along with specific evaluation and grading criteria.
- Information about pre-departure meetings/orientations (programs are required to meet at least twice prior to departure) and any post-program debriefing meetings (optional).
- A dated, day-by-day agenda articulating daily logistical/travel information, academic goals, lectures, site visits, experiences, readings, assignments, and periods for academic work or independent exploration
- Sections covering Academic Honesty, Behavior/Rules, Non-Discrimination, Disability and Accommodations, Post-Program Surveys, and Credit Hour justification

### 1.1.3: Prerequisites, Degree Fulfillments, and Recruitment

If a program does not enroll enough students to run, it will matter very little how well the program has been designed or the amount of work put into creating an outstanding experience. Therefore, Program Directors should consider what motivates students to enroll in a program from the very beginning and keep their target population in mind at all points in planning. Now more than ever, students are particularly concerned with making study away and study abroad experiences count not just as transformative experiences but also towards degree requirements within their four year plan.

As a rule of thumb, Program Directors should anticipate a group equal to 5% of the pool of students who would receive more than general elective credit from the program. For instance, to fully enroll a Short-Term Faculty-Led Program with 20 students, a Program Director should have a target population of roughly 400 students in mind who would be eligible for the course and receive major, minor, or Dialogues credits for the program. If the Program Director’s department has only 200 majors and minors and the program is being designed with only major and minor elective credit for those students, she or he should consider whether

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<sup>15</sup> See footnote 11

there is another group of majors or minors from another department in which the program could be offered for major/minor credit. Keep in mind that Short-Term Faculty-Led Programs should have a target of 12-20 students (so pools of 240+ students). Adding Dialogues requirements to a course, when appropriate, opens a course to a very large pool of students and should be considered where possible.<sup>16</sup>

Program Directors should also carefully consider the balance between any prerequisites and recruitment. While prerequisites allow for more advanced academic content, they also limit the pool of potential participants. Any prerequisites should be carefully evaluated regarding the extent to which they will enhance the course, weighed against the extent to which they will hinder enrollment.

Any prerequisite required or degree fulfillment offered for a program must follow general Truman guidelines and policies and be confirmed through sponsorship by the appropriate chair or Dialogues designee during the approval process. Once approved, they must be clearly stated on the syllabus and all published marketing materials for the program.

#### 1.1.4: Credits

Short-Term Faculty-Led Programs may range from 3-6 credits, while Extended Faculty-Led Programs may incorporate multiple courses totaling to 9-12 credits over the course of the summer.<sup>17</sup> Instructors are asked to suggest and defend an appropriate number of credits for their course in the syllabus they submit with their proposal. At the design stage, instructors have the freedom to adjust their program in order to ensure more or fewer credits as necessary.<sup>18</sup> Factors to consider in determining credits should include:

- The defensible amount of work and effort involved in the program (see more below)
- The desire of students for a certain number of credits and their desire for a certain program cost
- Salary requirements for the program leaders (see more on salary and credits in section 3.5: Faculty Expenses and Salary)
- Financial aid needs (most students must be enrolled at least half-time or 6 credits during interim and summer terms in order to be eligible for federal financial aid)

According to the standards listed in Truman’s credit hour policy (paragraphs 7 and 8),<sup>19</sup> the minimum necessary hours to complete a study abroad program of various credit lengths would be equivalent to 2 hours and 50 minutes per week x 15 weeks = 42.5 hours minimum of work per credit. This translates to the following minimum hours and suggested lengths for programs:

Program Credits	Minimum Hours	Suggested Length
3 Credits	127.5 hours	9-15 days
4 Credits	170 hours	12-20 days
5 Credits	212.5 hours	15-25 days
6 Credits	255 hours	18-30 days

<sup>16</sup> More information about enrollment targets can be found in sections 1.3.2: Class Sizes, 3.5.3: Salary and Enrollment, and 4.1.2: Enrollment Minimums and Cancellation

<sup>17</sup> See program definitions at 0.1.5: Program Types

<sup>18</sup> New courses may also be passed through Faculty Governance with a flexible credit range to accommodate program adjustments over time.

<sup>19</sup> <https://www.truman.edu/policies/credit-hour-policy/>

The suggested lengths in the chart above reflect the reality that faculty-led study away or study abroad courses involve multiple modes of instruction, from classroom spaces to on-site lectures, tours, reflection times, etc. Beyond explicit modes of instruction, the time spent in the country--navigating, having encounters and experiences with locals--also contributes to the educational experience. Therefore, CIEA embraces the flexibility of the institutional policy in regards to what should count towards “equivalent hours” to classroom instruction.

### 1.1.5: Fulfilling the Intercultural Perspective Requirement

The Truman Catalog states that “All Study Abroad experiences approved for academic credit at Truman fulfill the Intercultural Perspective Requirement.” However, CIEA expects faculty who design faculty-led study abroad programs to be intentional in addressing the learning objectives related to the Intercultural Perspective requirement.<sup>20</sup> The Dialogues description of the Intercultural Competence requirement states:<sup>21</sup>

*An intercultural perspective is more than the observation of cultural differences or a celebration of “exotic” food and clothing styles. Rather, a meaningful intercultural perspective arises from direct experiences with cultural diversity and cultural interactions. In a rapidly changing world, understanding cultural differences is important in fostering a perspective of global concern and acceptance of a range of cultural responses. We learn to thrive in diverse work and living environments. Our lives are enriched by the presence of diverse people and ideas. We become aware of the political and social significance of cultural differences. The exchange of ideas becomes multifaceted and complex when two or more cultural perspectives are engaged. A student who has successfully completed the intercultural perspective should be prepared to approach intercultural interactions with awareness and attentiveness.*

*Coursework and study abroad experiences can foster a student’s intercultural perspective, as can service learning, internships, and other intensive experiences designed to create an environment for intercultural interaction.*

*Students completing the Intercultural Perspective requirement:*

- 1. Have a greater knowledge and appreciation of cultural diversity through the study of other cultures, as well as their own;*
- 2. Are critical and self-reflective, developing an understanding of how culture influences behavior, and in turn, how cultural differences impact intercultural interactions; and*
- 3. Have an awareness of the political and social aspects of culture and cultural diversity, and an awareness that intercultural consideration allows one to transcend (but not erase) cultural and ethnic differences.*

When faculty create learning objectives for their faculty-led study abroad programs, they should consider ways to include the goals of this requirement into their course. In achieving this, some of the following thoughts may prove helpful:

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<sup>20</sup> This requirement is optional for study away programs.

<sup>21</sup> <http://catalog.truman.edu/> > Dialogues Curriculum

*Faculty-led programs naturally involve transformative learning.* A common declaration made by students on faculty-led study abroad courses is: “it changed my life.” Their testimonies affirm that the study abroad experience can be one of the most powerful learning experiences of a college student’s career. Patrick Quade, former director of international studies at St. Olaf College, found that “studying abroad can enhance many affective or attitudinal outcomes such as students’ ethno-relativism, global mindedness, and sense of self-efficacy. This is learning that alters a person’s worldview, cultural assumptions or sense of self, learning that blurs the boundaries between the cognitive and affective, or learning that fuses the outer cultural self and the deeply personal. There is a sizable literature on this subject, far beyond what can be described here. There is little doubt, however, that immersion in a culture different from one’s own creates episodes wherein the normal boundaries between academics, a student’s emotional sense of self and personal growth powerfully blend together. These are opportune times to challenge cultural assumptions, understand privilege, appraise one’s place in the world, and see oneself and the world in a new light.”

*Program Directors serve to enhance and orchestrate these transformative learning experiences.* Program Directors have within their purview all the elements necessary to elicit transformative learning experiences in their students. Intuitively, they probably already understand this potential about studying abroad, but building transformative learning into the course itinerary has a serendipitous quality to it. It may be best to think of transformative learning experiences in students as occurring on a continuum, from mild to moderate to life transforming. The challenge is to create assignments and learning experiences that foster transformative learning and allow for their power to be integrated into the students’ worldview and sense of self and to assess them.

*Consider strengthening the intercultural perspective on two levels.* Researchers Janet and Milton Bennet have produced a model of intercultural learning that divides student learning in a culture into two forms. There is learning about the host country culture “writ large”--its history, geography, political system, economics, religions, and languages. In other words, explicit culture on a large scale. The second, culture “writ small,” is more interpersonal, and comprises manners, qualities of interaction, everyday behavior, and personal values. The Bennets have advanced the notion of “cultural competency” that involves student understanding of the host country’s culture both “writ-large” and “writ-small” and their ability to effectively operate in the host culture.

*Incorporate natural stages of intercultural response into the learning process.* Milton and Janet Bennet and Mitchell Hammer have created a model of “intercultural sensitivity” which describes the processes by which students move from an “ethnocentric stage” (an initial fear response to a new culture) to an “ethno-relative stage” wherein they are more adaptable, more accepting and integrating of the host culture. The extent to which course objectives include transcending ethnocentricity and cultivating ethno-relativism will determine whether or not – and how – assignments and assessments are built in, to stimulate this form of cross-cultural learning. Even if they are not a primary course objective, e.g., if an instructor is teaching a science or art history course, students will be taking in, interpreting, and possibly evaluating or judging the host country culture. We advise Program Directors to incorporate this learning into their course, whether overtly and formally as part of the course content, or informally through reflections and processing time.

*Create spaces where students encounter the “other”:* The issues raised by the Bennets’ and Hammer’s work illustrate one of the most basic of student experiences in the faculty-led course: encountering the cultural “other;” the one not like us, who is not of our social group, who speaks a different language, who acts in

different ways, whose skin color, mannerisms, attitudes, and lifestyle may not be like our own. One of the appeals of global travel is that it allows us to encounter the cultural “other,” and hopefully, through learning, insights, and skill, transforms the ethnocentric recoil away from the “other” toward a deeper understanding of shared humanity. Program Directors can reduce the distance between people of different cultures and model satisfying encounters between “cultural others.” As faculty design and conduct courses, they should pay attention to the many opportunities students will have to humanize the “other.”

*Acknowledge and discuss stereotypes:* Stereotypes are simplistic cognitive categories our minds create in order to deal with the often overwhelming diversity of our day-to-day social experience. Rather than trying to understand and interpret the minutiae of daily human contacts as individual events, we slot these encounters into stereotypes. When we encounter another similar social event or agent, it can be quickly categorized into its respective stereotype, freeing our minds up to do other things. The problem is, stereotypes of the cultural, racial, or ethnic “other” are often shaped by limited experience or by rumor or attitude, or are inflated by television or film portrayals uncritically absorbed from parents, peers or media. A faculty-led course can put students into settings where they can confront limiting cognitive and affective stereotypes, and if handled skillfully, grow larger than them. Research indicates that the negative effects of stereotypes can be reduced through repeated encounters with the stereotyped “other.” Especially when these are face-to-face and personal and our minds are forced to deal with the “other” as a distinct human being with similar traits, needs and desires as our own, they become humanized. In the process, our stereotype is altered, or in some cases, rejected altogether. Research also indicates that when we have to work together with the stereotyped “other” towards a common goal, delimiting stereotypes can be more readily rejected.

### 1.1.6: Course Assignments and Components

Because the conditions for academic study vary significantly between study away programs and on campus courses, instructors should carefully consider what assignments and evaluative measures will be incorporated into their program. On faculty-led programs, expectations around grading can be a challenge and assignments are likely to be more subjective than the objective tests to which many students are accustomed. Therefore, regardless of the assignments chosen, it is important to articulate clear grading standards to students. Here are some general considerations to keep in mind:

*Timing of Assignments:* Instructors may incorporate assignments before, during, and after the on-site portion of the program. However, instructors may want to think of student work as a bell curve in which work required in advance is more minimal, so as to not interfere with their current term courses happening simultaneously, then builds into the experience, and tapers off following the program.

*Prepping students for upcoming experiences and assignments:* Take time and use assignments to prepare students for what they will experience. Faculty-led learning experiences are integrative, requiring students to draw knowledge from a site visit, a guest speaker or other learning opportunities unique to the course. Situate assignments within the course to help students make the linkages.

*Observations, inferences and critical cross-cultural thinking:* The cross-cultural experiences students have in a faculty-led course create conditions in which they can practice the three-fold process of making observations, drawing inferences from the observations, and then performing critical analysis of their inferences. Making objective observations is a valuable skill in many fields. Distilling valid inferences from those observations

allows students to demonstrate understanding of key course themes. Critically analyzing their inferences to expose ethnocentric cultural assumptions can then anchor assignments in the kind of critical cross-cultural analysis faculty-led programs afford.

*Processing learning experiences:* Pay more attention to “processing” or reflecting on learning experiences – be it a site visit, a guest speaker, or unexpected events which can be integrated into course objectives, such as a compelling train or bus ride. Post-learning experience processing will help students connect these events to the academic goals of the course.

*Creativity:* Create assignments that draw on students’ artistry, imagination or the full array of senses to complete the assignment. Along with our dominant senses of sight and sound, smells, textures, temperature, and tastes can be invoked to help distill a more holistic learning. Photographs, art, and multimedia can all be used in this regard.

In addition to these general considerations, here are some helpful tips regarding common assignment types and other course components:

*Course readings:* The rigor, quantity and applicability of readings help establish the academic integrity of the course. When effective texts are selected by the Program Director and assigned in a timely fashion, readings help students orient to the culture prior to arrival, by establishing the historical and cultural backdrop of the host country. During the time abroad or on-site, readings will continue to help prepare students for site visits and speakers they will be encountering, and will create the cultural context for students to truly appreciate these learning opportunities.

*Guest speakers and local experts:* Another cornerstone of faculty-led courses are encounters with local experts. For example, they can be drawn from universities, schools and think tanks, government and intergovernmental agencies, NGO officers, media sources, museums, or art galleries. Again, instructors can build assignments, journal entries, occasional papers or research activities around the learning that can be elicited from an expert speaker.

*Excursions and other visits as teaching opportunities:* Typically, site visits, excursions, and other visits are cornerstones of a faculty-led course, as they provide opportunities for students to engage with the host culture and the experiential nature of the course. Student learning therefore should reflect directly back to the course objectives. Prepare students in advance with readings and videos, make clear the purpose of the visit and create assignments which link the site visit experience with course objectives. When possible, alert students in advance about what to expect, and provide historical and cultural background. After the site visit, use the experience for post-site visit reflections and processing.

*Research or term papers:* Research can take many forms—not just the type elicited from studying academic journals and texts, but also interviews, observations, photographs, collecting print materials, and field experiments in the host country. If a research paper will be assigned, consider how students might draw from such experiences in constructing their papers.

*Discussion groups:* There are many benefits of assigning discussion groups. For one, they are responsive to students’ ongoing experiential learning because they create opportunities to “process” with other students, while comparing and contrasting their learning with others. A second benefit is that they help build a sense of

collegiality and a team spirit. Discussion questions on the road can also be altered to facilitate thinking about a specific site visit or speaker. Discussion group questions can also be crafted to stimulate thinking about specific concepts during different points in the course. For example, early in the course, student expectations about what they believe they will encounter in the host country can elicit productive discussions. Later in the course, the focus can shift toward integrating their experience and looking ahead to life after they return.

*Journaling or short essays:* Immersion in another culture – so central to a study abroad course – lends itself to personal reflections best recorded in a journal. Reflective journaling leaves open to students the option to write about what is meaningful to them within the constraints the Program Director sets in the syllabus regarding the assignment. Through writing, students can privately work out issues they may be dealing with. Another benefit of assigning a journal – and heavily weighting it in the course grade – is its flexibility. Students can be required to journal about a recent experience – whether planned or unplanned – and thus facilitate learning toward course objectives.

## 1.2: Itinerary

### 1.2.1: Program Dates and Length

Many leaders wonder when to schedule their program and how long the program should be. While the answer to this question will vary greatly from program to program, please keep the following in mind:

- “Summer” courses may begin any time after Spring commencement and must conclude before the last day of the August Interim term. Beyond this, faculty-led programs are not required to conform to any term dates, and will be listed with the registrar under the term in which they begin (e.g. a program starting during the May Interim could stretch all the way into July, but it would be established as a May Interim course). In contrast, Winter Interim courses must start and end within the designated Winter Interim term dates.
- Program leaders should consult the credit guidelines (see section 1.1.4: Credits). The length and intensity of a program should match its credits and vice versa. The amount of credits assigned will also affect the cost of the program and salaries offered.<sup>22</sup> At the design stage, leaders should look for a balance between all these components that works well for them.
- Short-Term Faculty-Led Programs (3-6 credit programs) are best at a length of 10-30 days, though they can be anywhere from 9-45 days. Shorter trips may be too intense, and students may feel they did not get enough experience in the country for the amount they paid. Longer trips can create a course pacing that is too slow and can also be cost prohibitive.
- Extended Faculty-Led Programs (9-12 credit programs) are best at a length of 45-60 days, since they require substantially more time and involve multiple classes. These programs tend to be residential and based in one location so that students are not quickly exhausted by the experience. They also generally allow more free time for students to explore on their own.
- For longer programs, leaders should consider including one “down” day per week for students to rest or explore on their own. This can help relieve some of the intensity and fatigue of these experiences and refresh students as they continue the program.
- Leaders should investigate local cultures and conditions to ensure that selected program dates do not present obstacles to program plans (such as weather conditions or cultural events)
- Time of year and location may also affect the budget of the program, depending on peak seasons for

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<sup>22</sup> See section 3.5: Faculty Expenses and Salary for more salary information



the location. Corresponding with a peak is often unavoidable, but it is worth investigating whether early or late summer may present better opportunities.

### 1.2.2: Location

In many cases, the idea to teach a course abroad or away from campus comes from a faculty member's personal or professional experience with a particular location, such as a recent trip or research interest. In other cases, faculty members may not have contacts in the region but there is a strong cultural connection to their academic discipline. It is generally advisable that a program leader have first-hand experience with the location. In some cases, CIEA can provide development funds for location visits.<sup>23</sup>

Every location offers its own unique possibilities and risks. When considering a program location or weighing between various potential sites within a country, leaders should consider the following:

- *Academic:* Which location offers the best opportunities to enhance the course content, stimulate students, develop knowledge and skills, and provide the culture and experiences needed to accomplish the course's learning objectives?
- *Travel:* How accessible is the location and what forms of transportation/level of travel intensity are used to get there? Can it be reached in a timely manner and at a reasonable cost?
- *Timing:* Which time of year is best to visit the site? Will the weather cooperate? Are there important cultural events to either experience or avoid?
- *Accessibility/Physical Demands:* What kinds of students will or will not be able to handle any restrictions to accessibility or physical demands associated with visiting this location?
- *Cost:* Is the location the best deal for the kind of experience and academic objectives of the course, or are there other, less expensive destinations that should be considered?
- *Multiple Sites:* Will the program stay at one location or travel to multiple locations? What travel needs, energy demands, and costs will be associated with moving between sites? Do the programmatic benefits of each site justify the costs of their inclusion?
- *Health and Emergency Response:* What will happen if a participant is injured or an emergency occurs at this location? What medical and emergency services are available at this location?
- *Safety and Travel Advisories:* Are there U.S. State Department or CDC warnings in place for this location? CIEA will not approve programs to locations with a level 3-4 State Department warning or a level 3 CDC warning. Are there ongoing situations in the location or advisories (including level 2 warnings for the State Department or CDC) which may escalate?
- *Preparations:* What are the immigration requirements for entering the country? Are complex visa procedures required? What vaccinations are recommended by the CDC for this location and what kind of time and cost commitment will be required of students to receive them?
- *Sustainability:* A lot of work goes into developing a faculty-led program. Can the program run successfully to this location for more than just one or two years?
- *Non-Western European Destinations:* Western European destinations are the most common and the most expensive. Have opportunities to experience other cultures in more affordable destinations like South and Central America or Southeast Asia been considered?

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<sup>23</sup> For more information, see section 2.2.1: Program Development Funds

### 1.2.3: Balancing Rigor and Fun

Some students may come into short-term programs expecting a faculty-led program to be a kind of tourism with college credit, while some Program Directors may create programs that are so academically rigorous as to be exhausting. We encourage instructors to aim for an academic experience in the “sweet spot” between being overly onerous and overly superficial. Program leaders should ask themselves at an early stage what level of academic work will give students a quality educational experience, while also allowing them adequate time for reflection and local cultural experiences.

Instructors should also consider the balance between structured and unstructured time. It is easy to over-schedule during a short program where there are many opportunities. Yet too little free time results in information overload and course fatigue. Traveling abroad is a potent experience and students need scheduled “decompression points” to rest, reflect, and engage in independent exploration. On the other hand, too much free time reduces the academic integrity of the course and may leave students wondering what they paid for.

### 1.2.4: Selecting Sites and Activities

Whatever excursions and activities are included should be relevant to the learning objectives of the program, take advantage of local resources, and be realistic in terms of time, distance, safety, and cost. If an activity which has an above average level of risk is being planned, please contact CIEA to discuss risk management. Descriptions of each excursion and activity should be included in the program syllabus/itinerary and will need to be budgeted into program costs.

Ideas for faculty-led study abroad programs can emerge in many ways: from a fascinating encounter with a specific opportunity abroad to a faculty member’s research interests or just a general love for a specific culture. Once an idea or destination presents itself, the possibilities can seem limitless, but the difference between a good faculty-led program and a great faculty-led program is a focused academic plan. Whether centered on a foundational experience, academic theme, or educational goal, the best programs find a point of connection and unity that runs through all the preparations, events, assignments, site visits, tours, lectures, or interviews with local experts that students experience. Program Directors often wonder what to include and what to leave out of their course plan, so we recommend the following:

*Get clear on goals.* Clarity around the fundamental objectives of the course can be used to distinguish what belongs in the course and what does not. It will also make an intense and full program for students that feels like something more coherent than just many events in a row, and give them a framework for understanding and integrating what they experience.

*Connect with locals.* Whether through phone calls, emails, or travel to the destination, search out any connections or contacts in the host country. The faculty and staff at host-country universities, colleges, schools, museums, libraries, community centers, NGOs, and religious organizations are all potential resources to find and recruit knowledgeable experts for the program. Also, check with colleagues at Truman or CIEA. Discussing plans with locals may help to eliminate less appropriate events and also introduce new possibilities.

*Vet activities.* Reach out directly to contacts at a planned site. Ask questions to see if they will be able to accommodate the program's plans. Carefully review any available information sources or reviews from others. Find out if there are ways they could enhance the visit based on the program's goals.

*Incorporate variety and consider flow.* Instructors should also consider the overall flow of activities in relation to one another and the amount of demand the itinerary will place on the participants. Avoid putting three museums in a row, for instance. Rather, look for ways to interweave more and less demanding experiences and mental, physical, and sensory stimulation. Also, don't forget to allow time in the schedule for down time, self-exploration, shopping, and socializing.

*Be aware of physical demands.* Some short term programs may include excursions, activities, or transportation which require a certain level of physical capability. Examples are if participants must be able to hike 5 miles in rough terrain, climb 300 steps, or if the group will be using a considerable amount of public transportation such as buses and subways that may not be handicap accessible. It is important to include this information in the program brochure and marketing information. CIEA can include information in the online application if requested by the Program Directors.

## 1.3: Group Considerations

### 1.3.1: Leadership

Faculty-led programs may be designed with several different types of leadership structures, including varying numbers of Program Directors and/or Program Assistants, which differ for Short-Term Faculty-Led Programs and the Extended Faculty-Led Programs. Standard leadership models are described below, but alternate models may be discussed with CIEA in the planning process. The choice of a program leadership model should be suggested by the Program Director in their proposal and will then require approval by CIEA.

Models for Short-Term Faculty-Led Programs are:

- Standard Program Model
  - Program is designed with only one Program Director planned for all levels of enrollment
  - Program Director has sole responsibility to recruit, administer, and instruct the program
  - Program cost covers this Program Director at every level of enrollment
  - Program Director receives the full salary for the program according to the salary policy<sup>24</sup>
- Co-Director Program Model
  - Program is designed with two Program Directors planned for all levels of enrollment
  - Program Directors share responsibilities to recruit, administer, and instruct the program
  - Program cost covers two Program Directors at every level of enrollment
  - Program instructors split the available salary, each receiving half the amounts outlined in the salary policy

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<sup>24</sup> For more information, see section 3.5: Faculty Expenses and Salary

- Director with Assistant(s) Program Model:
  - Program is designed with Program Director and a Program Assistant or Assistants
  - Program Director is responsible to recruit, administer, and instruct the program
  - Program Assistant assists Program Director to recruit, administer, and instruct, as specified in a detailed job description
  - Program cost covers Program Director and Program Assistant(s) at any level of enrollment
  - Program Assistants must be approved by CIEA
  - Program Assistants may receive a stipend (included as a group travel expense) of up to \$100 per day depending on enrollment and duties as approved by CIEA
- Director with Assistant at High Enrollment Model:
  - Program is designed with Program Director and a Program Assistant who accompanies the group if enrollments reaches a specified enrollment point
  - Program Director is responsible to recruit, administer, and instruct the program
  - Program Assistant assists only with group leadership during travel
  - Program cost covers Program Director at all levels of enrollment and the Program Assistant at enrollments at the specified enrollment point
  - Program Assistants must be approved by CIEA
  - If program is longer than 14 days, assistants may receive a stipend (included as a group travel expense) of up to \$50 per day as approved by CIEA

Models for Extended Faculty-Led Programs are:

- Standard Model:
  - Program is designed with two Program Directors and an enrollment of at least 18 students. If enrollment falls below 18 students but remains higher than the minimum enrollment of 12 students, only one Program Director will lead the program.
  - Both Program Directors are responsible for recruiting, administering, and instructing the program
  - Both Program Directors are paid full salaries at their respective minimum (12/18) according to the amounts outlined in the salary policy.
- Director with Assistant at High Enrollment Model:
  - Program is designed with one Program Director and an Program Assistant who accompanies the group if enrollments reach a specified enrollment point
  - Program Director is responsible to recruit, administer, and instruct the program
  - Program Assistant assists only with group leadership during travel
  - Program cost covers Program Director at all levels of enrollment and the Program Assistant at enrollments of the specified enrollment point
  - Program Assistants must be approved by CIEA
  - Program Assistants may receive a stipend (included as a group travel expense) of up to \$50 per day as approved by CIEA

Regardless of the leadership structure chosen for a faculty-led program, clear expectations should be developed early in the program regarding the specific roles that each leader will play in the program. These expectations should be shared between leaders, between all leaders and CIEA, and between leaders and

students as the group forms. Ideally, faculty members who propose to co-direct a program will know each other well or have experience working together in the past.

All Program Directors and Program Assistants need to be approved by CIEA. Their names should be included in the program proposal whenever possible. These leaders may be drawn from Truman's faculty, instructors, adjuncts, other Truman staff, or even outside hires. However, if these leaders are not current employees of Truman, they will need to complete additional paperwork to be registered as employees of the University and follow relevant HR procedures. All Program Directors and Program Assistants are expected to be able respond to emergencies in accordance with Truman policy and therefore must attend CIEA's Emergency Training in the fall prior to departure.

In some cases, third-party contracts include program coordinators, guides, or other services for accompanying groups and facilitating travel. When such support services are included in a third-party contract, the individuals who fulfil these duties will not require registration as University employees. Third-party coordinators and guides will be considered by CIEA and the review panel in determining the need for the addition of any other instructors or Program Assistants for a program.

### 1.3.2: Class Size

In order to create a group experience conducive to a dynamic learning experience, keep the cost of programs affordable to students, and ensure attractive salaries for leaders, Truman establishes both target enrollments and cancellation minimums for all programs. Program leaders are expected to commit to a good faith effort to recruit the maximum number of students possible for their program. A history of low enrollment will be considered when existing program proposals are resubmitted and reviewed. Enrollment targets vary between Short-Term Faculty-Led Programs and Extended Faculty-Led Programs. In each case, program leaders will consult with CIEA to set several enrollment targets including: a cancellation minimum, an enrollment goal, and in some cases a maximum. These numbers are subject to the following guidelines:

- For Short-Term Faculty-Led Programs:
  - Cancellation Minimum: All Short-Term Faculty-Led Programs will have a cancellation minimum of no less than 8 students. Under certain circumstances, the cancellation minimum may need to be higher when the pricing of the program depends on a certain number of enrollments.
  - Enrollment Goal: programs will be designed with a target of 12-20 students.
  - Maximums: Maximums, when necessary, must be approved on a case by case basis by CIEA. Instructors concerned about managing a larger number of students should consult with CIEA regarding a Program Assistant for larger numbers.
  
- For Extended Faculty-Led Programs:
  - Cancellation Minimum: The cancellation minimum for Extended Faculty-Led Programs is 12 students. Under certain circumstances, the cancellation minimum may be raised when the pricing of the program depends on a certain number of enrollments.
  - Enrollment Goal: summer programs should be designed with a target of 18-32 students.

- Maximums: Maximums, when necessary, must be approved on a case by case basis by CIEA. Instructors concerned about managing a larger number of students should consult with CIEA regarding a Program Assistant for larger numbers.
- Second Director Minimum: Extended programs must reach the enrollment goal of at least 18 students for a second director to receive a contract for the program

## 1.4: Logistics

Logistics for a faculty-led program refers to the full range of accommodations and arrangements that must be made in advance in order for a program to run smoothly. This includes transportation, lodging, classroom facilities, excursions, group meals, etc. The final logistical plan for a program is always a collaborative effort between the Program Director, CIEA, the Business Office, and third party providers. However, the initial sketch of this plan is the responsibility of the Program Director in advance of the program proposal. This section walks through some of the aspects of logistics that Program Directors should think through as they design and plan their program.

### 1.4.1: Logistical Arrangements and Providers

Most programs will be required to use an in-country vendor to handle the majority of their program logistics. In-country vendors can be an independent travel agency, community partner, or foreign university.<sup>25</sup> These providers draw on their expertise and in-country staff, business contacts, and facilities (classrooms, residence halls, etc.) to assist with program design, logistics, and marketing as well as health and safety risk management. While providers can add expense to the course, they also streamline a great deal of planning. Program providers can typically provide the following types of support, which can be personalized to the needs of the specific program:

- Assist with selecting location(s) that will reinforce the academic focus
- Assist with developing a schedule that maximizes use of the time abroad
- Conduct in-country student orientation and provide on-site information
- Arrange in-country transportation between sites, airport transfers, or even flights
- Organize and oversee home stays or other housing arrangements
- Rent classroom and office space and oversee education equipment needs
- Arrange logistics for field trips, excursions, or site visits
- Carry necessary liability insurance and implement health and safety measures on-site
- Assist in emergencies

All partners and contracts must be properly vetted and authorized by CIEA and the Business Office. During the planning phase, instructors should consult with the Coordinator regarding their logistical plans or for direction in how to approach logistical planning for their program. The development of relationships for the purpose of providing logistical services should also be done in collaboration with CIEA, as certain types of financial relationships require a request for proposal process in coordination with the Business Office that must follow certain legal requirements. CIEA should always be looped into conversations with potential vendors. Program leaders are not authorized to broker contracts for the University.

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<sup>25</sup> Individuals or individual contractors that will receive payments from the University must be able to define their business identity by completing a W8.

In some cases, when a program leader has extensive experience or in-country connections with their site, they may be approved by CIEA to develop a logistical plan without a third-party's assistance. In such cases all payments and partnerships with specific in-country providers of services such as housing, etc. must be individually vetted and payments arranged through CIEA. Program leaders without such experience or connections will not receive approval for alternative logistical arrangements as CIEA cannot play the role of travel agent to make a large range of individual bookings on behalf of a program.

Once a program has been approved for development, CIEA will work with program leaders to chart a plan for developing and securing contracts and arrangements with the vendors needed for the program.

## 1.4.2: Transportation

Group leaders should consider three main transportation needs for their program: international airfare to the destination, in-country transportation, and additional transportation needs for the group leaders.

### 1.4.2.1: International Airfare

Groups have two main options for international airfare. The first option is for the program to begin and end at an airport in the United States (typically St. Louis or Kansas City), with all participants travelling together via group airfare to the destination. The second option is for the program to begin and end at a designated location in the destination country, with all participants purchasing their own individual airfare and making their own way to the meet-up point.

Group travel is generally more appropriate when a program is shorter in length or moves between multiple destinations. Under these circumstances, the late arrival of a single participant at a meet up point in the destination country could create many problems for group leaders and the rest of the group. Leaders may also want to choose this option simply to create a certain kind of group experience or for their own comfort. The down side of group travel is that it is generally more expensive than individual travel (group travel should not be thought of as buying in bulk but rather as paying for the privilege of getting a large block of seats put aside on a flight). Also, when group travel is used, CIEA discourages and will not guarantee or arrange deviations from the group travel arrangement. This can be frustrating for students who want to stay in the country longer or have alternate travel arrangements in and out of the United States. CIEA and the business office do not have the administrative capacity to handle change or deviation requests. In some circumstances, students have been able to work out their own deviations directly with the airline, but in these situations they must still have the approval of the group leader and CIEA and complete a trip deviation waiver form for CIEA.

Individual travel can be a good option when a program is longer and takes place at a single location. Under these circumstances, a student's late arrival generally does not pose a great detriment to their experience or the group's plans. Individual travel is also generally the best option for study away programs. When individual travel is used, group leaders need to designate a specific meeting location and time in the program's destination city as the starting point and ending point for the course and communicate this clearly to students. This may be a location in an airport, hotel, or a school where the program takes place. Since the only requirement is that students arrive at the designated starting point and leave from the ending point, students are free to make additional travel arrangements for themselves beyond the scope of the program. Students who travel on their own should also be provided clear instructions on how to contact Program

Directors during travel and if there are difficulties meeting the group. To avoid liability issues, group leaders should not instruct students to purchase individual tickets even when they believe the program is confirmed. Instead, students should be instructed to wait for notification from CIEA that the program has been confirmed and they should purchase individual airfare.<sup>26</sup>

#### *1.4.2.2: In-Country Transportation*

In-country transportation varies significantly by program, so program leaders should note what they anticipate their needs being. Forms of in-country transportation might include: public transportation, train tickets, airport pick-up services, hiring coaches/group buses, or contracting with a vendor who provides for one or more of these services as part of a total travel package. In-country needs could range from on the spot ticket purchases for local public forms of transportation to hiring a company to secure a range of transportation needs from trains, coaches, flights, or boats to move the program through a variety of program sites.

Whenever companies are hired in advance to provide transportation services, whether for all-inclusive transportation services or just a single airport pick-up, companies should be vetted and questioned about their experience, applicable licenses, and liability insurance. In situations where transportation is going to be purchased while in-country or on the spot (such as public transportation tickets) it is generally advisable to price these tickets in advance and include them in the cost of the program and have the group leader purchase them. In cases where students will be required to make out-of-pocket transportation purchases while in-country, these expenses should still be estimated and clearly communicated to students in advance.

#### *1.4.2.3: Program Leader Transportation Needs*

Finally, program leaders should consider if they have additional transportation needs in addition to group travel. Advance bookings for program leader transportation need to be coordinated with CIEA, and reasonable transportation needs for program leaders will be covered by the program budget (more on leader expenses can be found below in section 3.5: Faculty Expenses and Salary). During the initial planning stage, leaders should start by listing what their own needs will be. These needs may include: a Cape Air flight, mileage, or a rental car from Kirksville to St. Louis to meet up with the group, individual international airfare when travelling separately from the group or when there is no group travel, and in-country transportation needs such as taxis or public transportation when the leaders need to commute from their lodging to a classroom site, for instance. It should be noted that when there is group airfare, at least one program leader must travel with the group to and from the destination country.

### **1.4.3: Lodging**

Program leaders must also consider what kind of lodging will be most suitable to their program, as needs vary considerably by program. In some cases, lodging can be included as part of a total package with a travel vendor, while in others accommodations will need to be booked independently. Program leaders must coordinate bookings with CIEA, who will also work to ensure that housing arrangements have been vetted and will pre-arrange payments wherever possible.

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<sup>26</sup>For more information about these issues, see section 4.3.6: Communication about Program Costs and Money



Lodging standards can differ considerably from one country to the next and for this reason lodging conditions can become a source of contention with students. Program leaders should provide students with as much information as possible in pre-departure meetings to help develop realistic expectations. For instance: Will they be sharing rooms? How are roommates selected? Will bathrooms be shared? Will they have access to a kitchenette, etc.?

When considering housing options, program leaders should consider the best balance of the following characteristics: location, cost, services, opportunities for cultural learning/optimizing exposure to culture, safety, and provider qualifications. Some common forms of housing include:

*University dorms:* Many universities around the world rent their dorm space during the summers when school is not in session. This tends to be an affordable option. Remember that differences in university calendars mean that university housing may not be available during all of the summer months, particularly during the May Interim.

*Hotels:* For short stays, low-cost hotels can be found in most cities. Lists of inexpensive hotels can be found in budget travel guides or consult the local or regional tourist bureau for additional hotel listings.

*Hostels:* Hostels can be an inexpensive way to house a large group in a central part of a city or region. They are often located in unusual buildings (deconsecrated churches, closed monasteries, former army barracks, etc.). Hostels frequently have limits on how long a group can stay and conditions are far from luxurious, so they are more practical for stays of a night or two than for the duration of a program. Facilities vary a great deal as well; some might have recreation rooms, dining rooms, vending machines, and private rooms, and others offer bunk beds and cold showers. It is important to investigate the quality of the hostel to assure that security is sufficient.

*Home stays:* Homestays are a great way to immerse students in the host culture. While they are encouraged, please note that they come with an extra layer of liability.<sup>27</sup> If homestays are being considered, Program Directors should work with an approved third-party provider who has expertise in arranging homestays. Host family or home stays require additional diligence in making sure the accommodations are suitable for program participants and meet safety, health, and security requirements.

Lodging must be arranged to ensure that: (1) male and female students do not share rooms, (2) each student has their own bed, and (3) Truman participants are not housed with non-program participants. Program leaders should be housed in separate rooms of the same housing facility as other participants or in a housing arrangement that is very nearby and accessible when the former option is not possible. If participants are staying with host families, the Program Director(s) must stay in the same general locale as the participants and must be able to easily and quickly respond to an emergency.

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<sup>27</sup> In some cases, this extra liability may need to be mitigated with additional insurance to protect the University and its employees.

#### 1.4.4: Additional Facilities and Services

Some programs require additional facilities (such as classrooms) or additional services (such as meals or tour services). During the planning stage, instructors should carefully consider and list their needs and then coordinate with CIEA to see whether these facilities or services can be contracted from a single service provider or will need to be arranged separately. All additional spaces and services should also be vetted to ensure the providers have proper experience, licenses and liability where appropriate, and can ensure a safe and healthy place or experience for students and leaders.

Leaders should carefully consider their classroom needs, including technological needs, and inquire to ensure that services and spaces will be adequate to their plans. Care should be taken to match technologies available on-site in the country with the content and assignments students are expected to complete.

At the same time, faculty-led programs often afford opportunities for teaching in non-traditional or on-site settings. Leaders may consider ways to forgo the use of classrooms and consider a range of other types of meeting spaces. In some cases, hotels can provide a meeting room or in a breakfast area for group meetings or check-ins. Creative inquiry can open doors to alternate classroom settings so rich with culture and history that they far exceed what can be accomplished in the traditional classroom with its desks, blackboards and data projectors. After traveling at great expense to another country, how much will anyone want to sit in a classroom? Classes can occur sitting on the steps of a monument or during the bus ride to a teaching site.

#### 1.4.5: Meals

Opportunities for eating can be a great way to enhance the cultural experience of a program, and at the same time a steady diet of unfamiliar food can be a challenge for students. Leaders should think carefully about how students will eat throughout the program and how meals will be paid for.

In some cases, some or all meals may be included through a third-party provider, who can arrange local food experiences or a regular source of food through a cafeteria or similar meal service. In other cases, students may be asked to be responsible for their own meals throughout the program by venturing out to find their own eating establishments. Some lodging may even provide a kitchenette where students can prepare their own meals with groceries. Each option has its positives and negatives. When students are generally responsible for providing their own meals, leaders may want to include some group meals where everyone eats together in order to share a special food experience. Welcome and farewell dinners are especially common.

For purposes of budgeting and transparency, students must be given clear expectations in advance of which meals will be provided for them and what they will be responsible for. When students are responsible for their own meals, they should also be given an estimate regarding how much to budget for meals and what kinds of options they are likely to have. CIEA does not distribute program funds to students for individual meals. When group meals or meal services are included in the program budget, they will either be paid for in advance through a contract with the providing partner or through the P-Card issued to the program leader. No refunds will be given to students who choose to opt-out of group meals or provided meal options.

#### 1.4.6: Cost Considerations

In recent years, Truman faculty-led programs have ranged in cost from about \$3,000 (for a 9-day, 3 credit-program to Mexico) to about \$10,000 (for a roughly 60-day, 12-credit program to Spain). Truman is committed to offering programs that are both high quality and affordable for our students. As leaders consider destinations and experiences for their programs, they should make sure to also investigate prices and ask themselves some of the following questions:

- Does the significance of the proposed program location justify the cost?
- Do the proposed excursions further the academic goals of the course of study? “Tourist” excursions may be costly; if they are not strongly connected to academic content and goals, they should be eliminated or suggested as an option for students to choose during free time.
- Can the academic goals of the program be met in one destination versus multiple locations? Some programs truly require multiple sites, whereas in others, one destination of significance will serve the academic purposes of the course. Each site adds new safety risks, transportation expenses, and logistical arrangements, which can be very costly.
- Does the anticipated number of students, location, and/or logistics justify the number of faculty leaders? A low student to faculty ratio often creates an undue cost burden on student participants, who must pay their own expenses plus those of program leaders.
- Does Truman or the faculty leader have a relationship with a university in the desired location? The ability to connect programs to existing university partnerships (usually exchange partners) has multiple benefits. If the institution can provide logistical support, classroom, and/or housing, it helps control cost and gives potential access to local experts, and a population of students in the host country, thereby deepening the cultural experience of participants.

#### 1.4.7: Communication Channels

It is important that there be a clear and consistent channel of communication between CIEA and program leaders while they are in-country. A communication channel and plan will be established between the program leader(s) and the CIEA Coordinator prior to departure, but during the planning stage it is recommended that program leaders begin to investigate their own cell phone plans and local conditions. It is preferable, wherever possible, that the program leader travel with a cell phone with which they can make direct calls to the United States while abroad. Capacity for this option can vary by the program leader’s cellular device and provider, but certain expenses such as an in-country SIM card, temporary cell phone, or international plan charge can be incorporated into the program budget. A further consideration will be the availability of cellular service and WiFi while in-country. In some cases, the direct line of an in-country partner can be designated as the communication channel.

#### 1.5: Safety

CIEA has ultimate responsibility for off-campus study health and safety, and will change logistics or make other appropriate decisions for each program, depending on the level of risk deemed acceptable for the specific program and/or country. Health and safety involves numerous factors that should be considered when selecting locations, planning excursions, working with community organizations, etc. Faculty leaders should always keep in mind the health and safety of their participants while abroad and anticipate situations prior to departure. During the planning and approval stage, the CIEA Coordinator will discuss proper vetting of vendors and the health and safety risks for each planned location, accommodation, or activity included in the program itinerary.

Faculty-led programs can only be offered in countries with a U.S. Embassy or Consulate and which have a Department of State travel advisory level 1 or 2 and a CDC travel advisory of 1 or 2, in accordance with CIEA's general travel advisory policy. If a travel advisory level 3 or 4 is issued for a destination after students have been accepted but before the group has departed the U.S., and CIEA decides to cancel the program, all recoverable costs paid by Truman on behalf of students prior to that time will be refunded. Should a travel advisory level 3 or 4 be imposed after the group has arrived at its destination, CIEA will work closely with Program Directors to determine the best course of action to reduce risk.

## PHASE TWO | PROPOSE

All faculty-led programs must be submitted as proposals. A call for proposals will typically be issued during the fall of the prior academic year in which programs are intended to run. Accepted proposal will require administrative approval from the sponsoring department and school, CIEA, and the office of the VPAA.

While leaders are not expected to have all plans finalized at the time a program is proposed, they are expected to have a substantial and thoughtful draft of their program. The previous section on designing and planning a program explains the various details and considerations to which program leaders should attend before submitting a proposal. Faculty interested in submitting a proposal should begin developing their program and consulting with CIEA and their sponsoring department at least 3-4 months prior to the proposal due date. This section describes the proposal and approval processes in greater depth.



## Checklists for Phase Two: Propose

### For Program Directors

- Submit a program proposal form to CIEA by the due date specified in the call for proposals
- Submit a request for program development funds at time of proposal (optional)
- Meet with the Coordinator after proposal submission to discuss the recommendations of the review panel and plan the continued development and approval of the course
- Deliver completed approval forms to the appropriate department chair and school dean for endorsement; Return signed forms to CIEA for final approval by VPAA
- Await notification of program approval from CIEA
- Continue working with CIEA to finalize program details ahead of recruitment

### For Study Abroad Coordinator

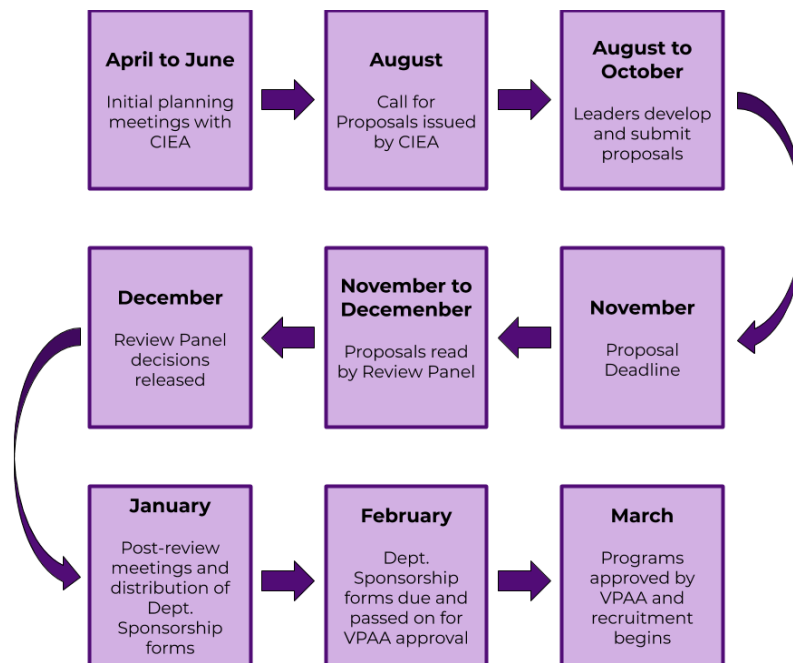
- Advertise the call for proposals for faculty-led programs each fall with a proposal submission form and due date
- Convene the faculty-led program review panel to review all proposals received by the due date and offer recommendations for their continued development
- Receive and respond to any requests for program development funds
- Meet with Program Directors to discuss the recommendations of the review panel and plan the continued development and approval of the program
- Complete appropriate approval forms and distribute to Program Directors; pass completed forms to appropriate administrators for VPAA approval
- Notify Program Directors and sponsoring departments and schools of program approvals
- Work with Program Directors to finalize program planning

## 2.1: Proposal and Approval Overview

Proposal and approval occur in the following steps, which are detailed in the following sections:

- CIEA will advertise a request for proposals for faculty-led programs, typically at the beginning of each school year (18-20 months before departure) for programs that would be offered in the following academic year. The request will include a link to a proposal submission form and establish a proposal due date (typically late October to early November)
- Program leaders submit a proposal consisting of basic program information, several short answer questions and an uploaded copy of either an integrated syllabus<sup>28</sup> or a syllabus and itinerary
- A review panel organized by CIEA reviews submitted proposals in November and makes recommendations regarding the further development of programs
- The Coordinator meets with program leaders to discuss the recommendations of the review panel and to make a plan for both approval and the completion of remaining planning for the program
- The Coordinator prepares the appropriate approval forms for the program and shares with the faculty leader to acquire department and school sponsorships
- New courses are sent through the Undergraduate Council and Faculty Senate
- The Coordinator completes a program budget in consultation with the program leader (this step is covered in Phase Three: Budget)
- The completed sponsorship forms (and new course forms) are returned to CIEA and passed with the budget to the Comptroller and VPAA for final approval
- Program leaders are notified that administrative approval has been granted and program marketing and recruitment may begin

### Typical Approval Process (During Academic Year Prior to Program Occurrence)



<sup>28</sup> See section 1.1.2: Integrated Syllabus

## 2.2: Proposal Contents

The request for proposals advertised by CIEA each fall will contain a link to a proposal submission form that can be completed online. This form gathers a range of information that will help CIEA and other administrators to assist program leaders to plan and execute their program. This form should be completed by the Program Director(s) and will request the following information and documents:

- *Leader Information:* Name, phone, brief bio, description of relevant experience or qualifications, description of capacity to handle emergencies
- *Program Information:* Sponsoring department(s), program type (new or existing), program/course name, credits, pre-requisites and degree fulfillments, start and end dates, location(s) to be visited, brief program description
- *Recruitment Information:* description of target audience and size of recruitment pool, recruitment and marketing plans
- *Documents:* Integrated Syllabus<sup>29</sup> or Syllabus and Itinerary
- *Leader Expectations:* a description of expectations for program leaders

### 2.2.1: Program Development Funds

As a matter of course, CIEA does not provide program development funds. However, it will consider granting program development funds upon request for new programs or leaders, when possible, within its budget. Program development funds may be sought for a range of activities to develop a program, but primarily they would be requested for the Program Director to travel to the program site. Such exploratory travel can be an invaluable way for a Program Director to gain experience, confidence, and connections in the location. At the same time, because development funds are limited, leaders should be prepared to present CIEA with a well-formed plan for such travel that details its value for the program. Program Directors interested in applying for funds should write a letter or email to the Coordinator with an explanation of their plans, an itemized list of anticipated expenses, and a total amount requested. These requests should be submitted at the time of program proposal and no later than the proposal deadline. The review panel will review both the proposal and the plans for program development funds, and any awards will be communicated to the Program Director during follow-up meetings.

Program Directors are also encouraged to seek program development funds from other sources, including department or school funds or outside grants. In any case, when plans are made for significant program development or travel, details should be shared with CIEA in advance to better coordinate such efforts.

## 2.3: Review Panel: Criteria and Considerations

The faculty-led program review panel is composed of individuals appointed by the Executive Director for International Education and contains a mix of faculty, CIEA and Business Office staff, and other administrators. The committee's purpose is to review proposals holistically according to the program principles set forth in this *Handbook*, including their academic rigor, logistical aspects, safety, leader qualifications, and recruitment potential.

As a rubric for this review, the panel will use the "Elements of a Successful Program" (see section 0.1.4) as a guide. Recommendations of the committee may come in a variety of forms: considerations for improving the

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<sup>29</sup> See section 1.1.2: Integrated Syllabus



program (academically or logistically) or expanding recruitment considerations, identifying safety or planning issues that will need to be watched carefully or resolved for the program to continue, or a recommendation that a program make substantial alterations that may require the Program Director to wait a year and resubmit a modified proposal in the next round of proposals.

## 2.4: Continuation of Development and Approval

Following the meeting of the review panel, the Coordinator for faculty-led programs will contact program leaders and arrange to meet and discuss the recommendations and feedback of the committee. These meetings typically occur from December into early January. When a program has not been recommended for continued development, the Coordinator will share specific feedback from the review panel for how the faculty can modify their proposal to improve their chances for success in following years. When programs are recommended for further development, the Coordinator will work with the Program Director on several important next steps at the follow-up meeting:

- Review the proposal with the Program Director and share recommendations from the review panel for changes to the program
- Discuss any remaining ambiguities in the program and craft a plan for when and how these matters will be decided
- Review logistical plans and determine a timeline and plan for securing the appropriate vendors or contracts for the program
- Review listed expenses and budget items for completeness and determine a timeline and plan for securing additional estimates, etc.
- When possible, share completed sponsorship and approval paperwork with the Program Director to take to the relevant chair(s) and dean(s) for signature

Depending on the current state of development for the program, these matters may entail more than one meeting, or ongoing conversations with the Coordinator. Once the Coordinator determines that the program is developed enough to proceed to approval, he or she will complete the appropriate sponsorship and approval paperwork and share with the Program Director. Since every program is different, the exact approval process may vary, but a plan for signatures and approvals will be established before the paperwork is distributed.

This paperwork includes the basic details of the program and places for signatures by all sponsoring departments and schools. Program Directors should bring this paperwork directly to the appropriate chair(s) or dean(s), along with the most up-to-date copy of their integrated syllabus or syllabus and itinerary for their review and support. Completed forms should be returned to CIEA.

In the case of new courses, this approval paperwork will also need to go to any additional departments which have agreed to sponsor the program and award major or minor credits for the course or to the signatories for any Dialogues fulfillments for the program. They will then need to be passed through the Undergraduate Council and Faculty Senate in order to be approved as a new course at Truman.

Finally, approval paperwork, together with a completed budget, will be passed to the comptroller and VPAA for final administrative approval.

## 2.5: Renewal of Existing Program

Proposals are also required of Program Directors seeking to renew an existing program for another year. When there are no substantial changes anticipated to the program, it is perfectly acceptable for Program Directors to reuse their program materials from the current or previous year (including their current syllabus/itinerary) when making their proposal. However, the proposal should include updated dates for the coming year, as well as any other modifications that are already known. During the approval process, existing programs will require departmental sponsorship and administrative approval, but not Faculty Senate or Undergraduate Council approval. Directors of programs that have not run in over three years should consult with CIEA about what information they must submit in their proposal.

## 2.6: Program Approval versus Program Confirmation

Program approval grants a program a green light to begin recruitment and develop plans and partnerships in accordance with the approved syllabus/itinerary and budget; however, it does not guarantee that a program will run.

First, after being approved, programs must be confirmed by CIEA. Confirmation occurs when CIEA verifies that a program has reached the established minimum enrollment required through confirmation payments.<sup>30</sup> CIEA will not authorize the expenditure of program funds until a program is confirmed. Program Directors should disclose the risk of making out-of-pocket expenses to students before a program has been confirmed.<sup>31</sup> CIEA will contact the Program Director and student participants directly to inform them when a program has been confirmed.

Second, regardless of either approval or confirmation status, Truman State University reserves the right to discontinue any study abroad program at any time and for any reason it deems appropriate, whether before or after departure. International travel always entails risks and uncertainties, a global pandemic can emerge or a country with a long history of stability can suddenly undergo a political upheaval. In any situation that constitutes a serious change in the circumstances of a planned program or its destination during recruitment, pre-departure, or even during the course of the program, the Executive Director for International Education, in consultation with the Provost, will make a determination regarding whether a program will be cancelled or if required modifications will need to be made for the program to run. In such situations, to the extent possible Truman State will attempt to consider whole or partial refunds for students, depending on the status of various contracts and payments involved.

## 2.7: Follow-Up Planning and Faculty Training

Following the proposal and approval of programs, Program Directors will work closely with the Coordinator. Frequent communication with the Coordinator should be expected to ensure all remaining planning details are attended to in a timely manner. Additionally, Program Directors (both new and returning Program Directors) are required to attend two pre-departure seminars hosted by CIEA between the approval of their program and its departure:

- Recruitment Training – typically held in the Spring term of the academic year prior to departure – covers various strategies for marketing and recruitment, and helps leaders to develop their own

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<sup>30</sup> See section 4.4.3: Student Payments and Cancellation Conditions for more information

<sup>31</sup> See more about discussing costs during recruitment in section 4.3.6: Communication about Program Costs and Money

recruitment plan, explains the application process students will use to apply for programs through CIEA, and covers liability issues in recruitment

- Emergency Training – typically held in the Fall term of the academic year in which the program runs – covers how to prepare a group to travel abroad together, how to set good expectations, how to lead a group abroad, liability, health, and safety issues, and what to do in case of an emergency

The Coordinator is available to Program Directors throughout the year for ongoing advice and assistance, as requested, and can provide informal training or assistance on a range of other topics when needed.



Fees charged to students for Faculty-led programs are designed to cover all expenses for the program, including: all covered student expenses (such as lodging, transportation, admissions, etc.), all covered leader expenses (such as mileage, meals, etc.), all Program Directors' salaries and fringes and Program Assistant stipends and fringe, required insurance for all participants, contingency funds for emergencies, program marketing, and the administrative costs of CIEA. Responsibility for budget development belongs primarily to the Coordinator in collaboration with the Program Director(s) and the Business Office. This section describes the process of budget development, program payments, and other related financial matters.

## Checklists for Phase Three: Budget

### For Program Directors

- Include detailed itinerary information in your Integrated syllabus that can be used for budgeting and logistical planning
- Meet with Coordinator to review draft budget
- Work with Coordinator to arrange third-party vendors and contracts
- Review any updates to the budget and the final budget with Coordinator

### For Study Abroad Coordinator

- Review each program's integrated syllabus and draft program budgets
- Meet with Program Director to review the draft budget
- Submit draft budget with approval paperwork to the comptroller and VPAA
- Post approved program estimated price to the program website
- Work with Program Director and Business Office to secure third-party vendors and contracts
- Create updates to the budget and/or final budget and submit for approval
- Update any pricing changes to the program website
- Complete a plan for advance payments, P-Card payments, and reimbursements

### 3.1: Overview of Budget Development

The process of developing a program budget involves the following steps:

- Program Director(s) include detailed itinerary information with their program proposal that can be used by CIEA as part of their initial budget planning
- The Coordinator reviews the integrates syllabus with the Program Director and uses the information gathered to draft a program budget
- Coordinator reviews the draft budget with the Program Director, makes modifications as necessary, and submits it, along with other approval paperwork, to the comptroller and VPAA
- Budget is approved and estimated program price is advertised on the program website
- Final estimates and pricing for the program are gathered over the preceding summer, and a final budget with a fixed price is compiled by the Coordinator for faculty-led programs and reviewed with the Program Director
- Final budget is sent for approval to the Business Office and advertised on the program website

### 3.2: Budget Components and Principles

A completed program budget includes several components:

- Per student price breakdown, broken into five fees:
  - Enrollment fee (tuition), course fee(s), insurance fee, travel fee, housing fee
- Student payments timeline
- Organizational budget, broken into:
  - Institutional costs (leader salaries, program marketing, admin costs) covered by student enrollment and course fees
  - Third-party costs (including contract costs and trip expenses) covered by the insurance, housing, and travel fees

Third-party costs include both variable costs (per student costs that vary with the number of participants) and fixed costs (group costs that do not change with group size).

CIEA's budget development is guided by the following normative goals:

- Seeking to make programs affordable to the widest range of Truman students possible
- Ensuring a high quality academic experience for participants
- Working with reputable, well vetted vendors with proper experience, licenses, and insurance
- Making a budget transparent, inclusive, and detailed regarding all included costs
- Ensuring that the organizational budget stays balanced and covers all institutional and third party costs, even at the cancellation minimum
- Ensuring there is sufficient room in the budget to accommodate price fluctuations, routine uncertainty, and emergency situations

Due to their effect on program price, the following program elements should be evaluated closely:

- The cost of additional leaders (through their expenses and sometimes stipends)
- Program length and time of year
- Accommodation type (hostels and university dorms are less expensive than hotels, e.g.)
- Destination (some locations are more expensive than others, particularly Western Europe)
- On-site transportation (public transportation is less expensive than hired coaches)
- Cost of excursions or on-site guides

### 3.3: Standard Fees

All programs include these standard fees:

- Enrollment fees (tuition): All participants on Truman's faculty-led study abroad programs are charged at the in-state tuition rate (undergraduate and/or graduate depending on the program) per credit for the number of credits in the program. These rates change annually.
- Course fees: All faculty-led programs are assigned a Study Abroad course fee of \$18 per credit; Graduate courses or sections have an additional \$15 per credit Graduate course fee, as well.
- Insurance fees: All study abroad participants are required to pay a fee covering international insurance, provided by CISI (rate is renegotiated annually and will be provided by CIEA); study away participants may also be charged for required insurance as determined by CIEA
- Travel and Housing fees: These fees vary based on the amounts and types of expenses paid to third-parties for the program to operate

### 3.4: Variable & Fixed Fees

All fees collected in order to make third-party payments are placed under either the housing fee (for lodging and meal expenses only) and the travel fee (for all other expenses, including international airfare, instructor, and contingency expenses). Fees are divided in this way so that fees allowable for use with a 529 savings account (room & board) are distinguished from non-allowable travel expenses.

The amount of travel and housing fees vary by the needs of each program. The Coordinator will include a draft of these fees, based on the information provided by Program Directors in their Integrated Syllabus. In some cases these costs will need to be estimated until a quote has been obtained from a vendor. In cases where a quote is obtained, prices are still generally estimated at least 5% higher in order to accommodate potential price fluctuation until contracts have been secured. Quotes received in foreign currencies will also be subject to increased estimates based on CIEA's currency exchange calculation policy.

The travel and housing fees may also include a calculation of a per student fixed expense cost. Fixed costs are those that remain the same regardless of how many students enroll, such as the instructor's expenses. Fixed expenses are divided by one less than the cancellation minimum to provide a buffer in the budget.

Finally, the travel fee also includes a contingency fee of \$200 per student. These fees are not to act as a buffer or slush fund for budget overages, they are strictly for use in the case of a program emergency.

### 3.5: Faculty Expenses and Salary

All Program Directors receive a salary for program leadership and also have the entire cost of their participation in a program covered by the program budget. Participation expenses include both regular program expenses such as provider participant costs, travel insurance, group airfare, lodging, etc., and reasonable individual expenses such as personal travel to/from a U.S. airport and individual airfare (when not traveling as a group), meal costs, costs for cellular service abroad, local transportation, etc. as needed. Truman State does not issue per diems for faculty-led programs. All expenses must be itemized and will be covered through a combination of requisitions, a Truman issued P-Card, and/or reimbursements, depending on arrangements made with the leader in advance.<sup>32</sup>

Salaries for Program Directors are calculated differently for Short-Term Faculty-Led Programs and Extended Faculty-Led Programs, according to the following calculations.

#### 3.5.1: Salary for Program Directors of Short-Term Faculty-Led Programs

The salary for a Program Director of a Short-Term Faculty-Led Program is based on their annual base salary at Truman State University, the number of credits offered on the program, and the number of enrollments. The salary policy for 3-6 credit Short-Term Faculty-Led Programs uses a flat rate at the minimum enrollment of 8, a fixed percentage of the instructor's annual base salary at 12, and an increase of 1.25% beyond that rate at 16, with pay increases by equal increments at enrollments between these benchmarks. Faculty who are interested in a personalized salary sheet should contact CIEA, otherwise a detailed salary sheet will be prepared for each program leader at the approval stage.

	<b>3 Credits</b>	<b>4 Credits</b>	<b>5 Credits</b>	<b>6 Credits</b>
<b>8 enrollments</b>	<b>\$ 3,150.00 flat rate</b>	<b>\$ 4,200.00 flat rate</b>	<b>\$ 5,250.00 flat rate</b>	<b>\$ 6,300.00 flat rate</b>
<b>12 enrollments</b>	<b>7.5 % of base</b>	<b>8.75 % of base</b>	<b>10 % of base</b>	<b>11.25 % of base</b>
<b>16 enrollments</b>	<b>8.75 % of base</b>	<b>10 % of base</b>	<b>11.25 % of base</b>	<b>12.5 % of base</b>

- In cases where % of base calculated amount is lower than the flat rate at the minimum enrollment of 8, the flat rate will be used. This will cause instructors at certain salary levels to experience no pay scaling at various intervals.
- Total salary and fringe cannot exceed the available amount of tuition revenue from the program

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<sup>32</sup> The practice of cash advances to program leaders should largely be avoided and will require special approval by the Business Office. Advancing cash to employees to travel internationally represents risk to the employee and the University. Moreover, moving large amounts of cash internationally may potentially violate certain government regulations.



### 3.5.2: Salary for Program Directors of Extended Faculty-Led Programs

The salary policy for 9 or 12 credit Extended Faculty-Led Programs uses a % of annual salary basis at the minimum enrollment for each instructor.

	<b>Instructor 1 (9 Credits)</b>	<b>Instructor 2 (9 Credits)</b>	<b>Instructor 1 (12 Credits)</b>	<b>Instructor 2 (12 Credits)</b>
<b>12 Enrollments</b>	<b>15% of base</b>	-----	<b>20% of base</b>	-----
<b>18 Enrollments</b>	<b>15% of base</b>	<b>15% of base</b>	<b>20% of base</b>	<b>20% of base</b>

### 3.5.3: Salary and Enrollment

For the purpose of salary and fringe calculation, the number of enrollments is based on the number of students who complete all program payments after all payments become non-refundable. Program Directors are required to commit to running their program at any level of enrollment that meets or exceeds the cancellation minimum. The cancellation minimum is established in advance of the program before it is approved, in consultation with the Program Director(s). Program Directors unwilling to lead a program at certain enrollment levels must consult with CIEA to establish a cancellation minimum acceptable to their salary needs.

## 3.6: Payments and Contracts

### 3.6.1: Working with Third-Party Providers

Depending on the circumstances, some contracts with third-party providers will require a *request for proposal* (RFP) process.<sup>33</sup> In such instances, program details received in the proposal process will be used by CIEA and the business office to draft an RFP that will be sent out to potential vendors after review with the Program Director. If a Program Director has interest in a specific vendor, their name may be included in the list of recipients to which the RFP is sent. Once proposals are received, CIEA will organize a panel that will include the Program Director in order to review and select a winning proposal for the program. Contact with vendors before their selection is subject to a variety of rules and regulations. After a vendor has been awarded the contract, the provisions of that agreement may be adjusted by written addendum. It is important that an RFP process begin as early as possible, since this process can take weeks to several months to complete. With all arrangements, the Business Office will advise CIEA regarding whether contracts or other formal agreements must be completed for the scope of services being sought.

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<sup>33</sup> Truman reserves the right to accept or reject any or all proposals submitted for consideration. In addition, Truman reserves the right to negotiate specific aspects of a proposal submitted. All responsive proposals will be subjected to a comparative assessment based on published evaluation criteria.

Whether submitting a proposal or confirming discussed arrangements, third-party providers enlisted to provide services for a program should provide Truman with detailed, written information regarding the services they will provide for the program, their pricing, and all relevant information regarding their experience, qualifications, licensures, and insurance. Additionally, pricing must take into account the full range of possible enrollment levels and specify any tiers available in the pricing.

### 3.6.2: Contracts and Vendor Payments

Once a budget has been established and a program is confirmed, CIEA will coordinate the signature of any contracts and the payment of vendors with the Business Office. Program Directors are never authorized to sign a contract with a vendor on the University's behalf. Contracts must all be signed by the comptroller in collaboration with University counsel. Wherever possible, CIEA prefers that payments to vendors and purchasing be made directly through Truman's business office by requisition per the terms of the University's agreement with the vendor. CIEA and the business office will work directly with vendors to set up these payments. This limits the amount of accounting and money handling that both CIEA and the Program Directors must engage in.

This process is also to be used for the purchase of flights which must be obtained through the business office, whether for group flights or individual instructor flights. Program Directors who seek to be reimbursed for flights purchased without consultation with CIEA and the business office will not be reimbursed for the full cost of the flight if budgets are exceeded. In all cases, Program Directors should consult with CIEA before making any individual bookings, whether for flights, lodging, or other needs, even when such items appear in the budget.

### 3.6.3: P-Cards and Reimbursements

For payments that cannot be made directly by the Business Office, CIEA will assist Program Directors with the paperwork to receive a purchasing card (or P-Card) or authorize certain expenses for reimbursement after the program is complete. A P-Card is a Truman issued credit card that can be used for point of sale purchases or to retrieve cash from an ATM. Whenever a P-Card is issued, the limits for the card will be established by CIEA in line with the expenses that are approved for purchase with the card during the course of the program. The Coordinator will inform Program Directors when receiving a P-Card about the budgeted items they are approved to purchase with the card, but ultimate responsibility for making purchases in line with the budget will be on the Program Director. Furthermore, Program Directors will be responsible for completing an expenses reconciliation worksheet and saving receipts to track their expenses. The Coordinator will give further instruction to Program Directors regarding accounting responsibilities before departure. At the end of a program, the Program Director should give their expense reconciliation, along with receipts, to the Coordinator for review before that documentation is submitted to the Business Office. Meanwhile, the P-Card should be returned directly to the Business Office.

Any purchases made by the Program Director that have not been authorized by CIEA in advance, in accordance with the budget, will not be reimbursed. This includes purchases that are not itemized in the budget or which exceed budgeted amounts. Program Directors will be personally responsible for covering such overages. If unauthorized purchases are identified, Program Directors will be required to immediately reimburse the University program budget. When in doubt, Program Directors should confirm the use of funds with CIEA in advance. Whenever possible, this also includes seeking prior approval for the use of emergency funds.

### 3.6.4: Faculty Management of Program Funds

In their role as on-site financial managers, Program Directors will manage on-site payments during the course of the program, keep financial records, and make payments that haven't already been pre-paid. All of the program funds are State of Missouri funds and must be used only in compliance with all applicable state laws and Truman policies. Furthermore, the budget is developed with sufficient flexibility to accommodate routine fluctuations and changes, but Directors must work closely with the Coordinator to thoroughly understand the program budget, what amount of money they can spend, and how to record expenses. Documentation is essential for both legal and organizational reasons and CIEA will provide Program Directors with a method for tracking receipts and expenses.<sup>34</sup>

In addition to these overarching responsibilities, Program Directors should observe the following rules and guidelines:

- CIEA does not permit course leaders to give student participants any program funds
- University funds can never be used to purchase alcohol<sup>35</sup>
- CIEA and the business office both reserve the right to refuse to authorize reimbursement or to require repayment to the program budget for any expenses that were not included in the original budget, not supplied with sufficient proof, exceeded budgeted amounts or caused the budget to run over, were not authorized in advance, or are not received in a timely manner after the program has ended

If Program Directors plan to make program purchases out of pocket and then request reimbursement, they must arrange this in advance with CIEA. Even with reimbursements, Program Directors are subject to the same accounting procedures and must arrange in advance what budgeted items will be paid for and requested for reimbursement, to ensure that plans are made for spending to be kept in line with the budget. Mileage will always be paid through reimbursement after other expenses have been reconciled.

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<sup>34</sup> For more information see sections 5.3: Final Pre-Departure Materials, 6.3: Budget Management Abroad, and 7.2.3 Reconciliation of Program Expenses.

<sup>35</sup> See more information on alcohol policies in section 5.2.4.5: Alcohol and Drugs

This section of the *Handbook* covers recruitment, application, and student payment processes. Once a program has been designed, budgeted, and approved, the work of recruitment begins. CIEA will provide Program Directors with general assistance in this process, but each program will need its own marketing plan and the commitment of its leaders to get out there and meet with students one-on-one to get them excited about the program. In the process, leaders will want to be well informed about how to accurately represent and explain their program to students. Interested students will apply for the program and their applications will be reviewed and accepted by both CIEA and the Program Director. Finally, accepted students will complete payments to the University Cashier and submit all remaining information to CIEA, who will collect all pre-departure materials and compile them for Program Directors prior to departure.



## Checklists for Phase Four: Recruit

### For Program Directors

- Complete CIEA's Program Director workshop on recruitment (typically held in the Fall)
- Develop a marketing plan for recruiting students from the target population for your program
- Consult with CIEA regarding any plans to recruitment substantially from community members or non-Truman students, or if you plan to bring any accompanying family members
- Engage in a good faith effort to recruit using a range of marketing strategies to recruit the maximum number of participants for your program
- Adhere to the policies in the *Handbook* when communicating with students and refer them to CIEA or other appropriate offices when information is not known
- Work with CIEA to plan any program-specific application steps
- Review all applications received in a timely fashion

### For Study Abroad Coordinator

- Host Program Director workshop on recruitment for leaders in the Fall
- Be available to assist Program Directors in developing and executing a marketing plan
- Create a program website for each program and other marketing materials upon request
- Provide general marketing, promotional opportunities, and advising for faculty-led programs
- Notify Program Directors and participants when a program has been confirmed through sufficient applicants and payments
- Review all applications received, send acceptance emails and other notifications and reminders, track student payments, and collect all required program materials from students
- Process Foundation Scholarship applications and meet with committees to make awards

## 4.1: Enrollments and Participants

### 4.1.1: Who Can Participate

Truman faculty-led programs are open to a wide spectrum of participants:

- Either a currently enrolled student OR a student who has been accepted for enrollment by completing a non-degree-seeking student application (NDSA)
- Students in good academic, disciplinary, and financial standing with the university
- Either 18 years of age or older OR have the written permission of parents or legal guardians
- Both domestic and international students may participate (international students should speak with CIEA as they may experience different visa and immigration requirements)
- Students with any class standing may participate (students who wish to participate after they have graduated or in their final term may face restrictions on financial aid<sup>36</sup>)
- Meet any specific requirements of the particular program (such as prerequisites, graduate student status, etc.), which must be made explicit and clear in any promotional materials.

### 4.1.2: Enrollment Minimums and Cancellation

All faculty-led programs have enrollment minimums, for both financial and academic reasons. Academically, enrollment minimums ensure a dynamic group experience for discussion and engagement through an intense travel experience. Financially, each faculty-led program has its own balanced budget that covers all program expenses and compensation costs and contributes to the running of CIEA. Enrollment minimums ensure balanced budgets as well as attractive program prices for students. The enrollment minimum is 8 for short-term faculty-led courses and 12 for Extended Faculty-Led Programs, unless circumstances require the minimum to be raised.

Programs must reach the enrollment minimum (based on the number of students who have applied, received acceptance, and paid their commitment payment) by the commitment deadline or they will be cancelled, and students will have any payments refunded to them. Programs that reach the minimum enrollment by the commitment deadline but later fall below it due to withdrawals will be evaluated for viability on a case-by-case basis by CIEA.

Program leaders should be aware that accepting the minimum number of students into a program does not guarantee all will participate. Students must make a financial commitment in order for CIEA to count them in the enrollment. Commitments are measured in payments because without them CIEA cannot honor published pricing for the course or make payments to vendors.

### 4.1.3: Non-Degree-Seeking Students and Community Member Participation

Historically, the majority of participants on faculty-led programs have been currently enrolled degree-seeking students at Truman. However, in some instances participants have also come from the Kirksville community or other universities. These students can participate; however, to do so they must complete a non-degree-seeking student application (NDSA) for limited enrollment in the course prior to completing their faculty-led program application. Additionally, any participants younger than 18 years old must have supplemental paperwork completed by their parents or legal guardian, granting permission for their participation. The Coordinator can help such students through these processes individually upon request.

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<sup>36</sup> See section 4.3.5: Communication about Graduation Plans

Program leaders who anticipate recruitment from the community, other universities, or legal minors should coordinate with CIEA to help make the process for these participants smoother.

For non-degree-seeking students the NDSA must be accepted by the admissions department at Truman and completed prior to submitting a study abroad application through TruView. For students who have never taken a class at Truman before, the NDSA process will also provide the student with a Banner ID number and Truman login. Due to this extra step, we highly recommend that non-current students at Truman complete their NDSA paperwork at least one month ahead of the regular application deadline for their program.

Students from other universities who wish to have their credits transferred back to a home university can request to have Truman transcripts sent to their home institution following the completion of grading for their program, but they will be responsible for the fees for their transcripts. It is the responsibility of such students to work with the registrar and academic advisors at their home institution to ensure the successful transfer of any credits taken at Truman. All program fees (including tuition and course fees, insurance, and program fees) and deadlines will be the same for these students.

Program leaders interested in recruiting from the community or other universities should start planning for this early in the program development process and discuss their plans with CIEA. There are both benefits as well as challenges in designing a course that combines both degree-seeking and non-degree-seeking students. Leaders might ask themselves whether there is a natural audience for their course in these other areas and whether community members or non-Truman students will be able to be incorporated as full participants in the program as it has been designed.

Regardless of the participant's status, all programs are credit-bearing academic study which will be registered through a Truman transcript. At the discretion of the Program Director, participants may be allowed to audit courses to receive credit/no-grade rather than a letter grade. However, regardless of which grading option a student selects, all enrolled participants are expected to take part fully in all program activities. In the case of an auditing participant, program leaders should carefully consider which assignments will be required of such participants and make such expectations explicit both verbally and in written form.

Some degree-seeking students may also not fully embrace non-degree-seeking students on what they consider their educational experience, even when those non-degree-seeking students are learning, as well. Leaders will need to think carefully about how to handle the unique group dynamics that might occur. Will all participants have the same rules (e.g., no alcohol use, go out at night only in pairs, be on time every morning, etc.)? Or will non-degree-seeking students be allowed more independence? Make decisions about these things ahead of time, and be very explicit with all participants in the program about the ground rules and why they are what they are.

#### 4.1.4: Accompanying and Participating Family Members

The academic integrity and quality of the course for all students must always remain the top priority on all of Truman's faculty-led programs. An accompanying family member always risks distracting the attention of a program leader from this task, and therefore Truman strongly discourages this practice. Students may view one of their instructors having a spouse or partner shadowing the group as a distraction for the Program Director, and it can raise student concerns or misunderstandings about the use of the program fees they paid. The addition of an accompanying family member can also pose a dilemma for the faculty leader if there is an incident or emergency. The responsibility of the leader is to ensure the safety of the students; their attention should not be distracted by concerns over their accompanying spouse/partner.

At the same time, Truman recognizes that for various reasons and under various conditions, faculty leaders may have compelling reasons to request that members of their family accompany them or participate in a program they are leading. Truman State University does not support anything that compromises the Program Director's ability to give their full attention to the students and to the course or to fulfill their responsibilities, but will consider requests for spouses/partners and/or minor children of faculty to accompany them or participate in a course. Requests for accompanying or participating spouses, partners, and/or children must be made as soon as possible in the planning process and no later than the confirmation deadline for the program.

Family members who desire to participate in the course will be treated in the same manner as a regular student (whether degree-seeking or non-degree-seeking). As a student, family members must:

- Submit an application for the program (including an NDSA where applicable) and be admitted according to the same standards applied to other students
- Pay all program fees (full course fee, travel fee, insurance fee, and housing fees) as well as the enrollment fee (discounted according to the faculty member or faculty family member rate)
- Be covered by all relevant insurance policies for the program
- Make a deposit and all payments according to the established program deadlines
- Take the course for credit (though they may audit the course when the instructor has approved this option for non-degree seeking participants)
- Participate in all course activities and complete all assignments required of them based on the requirements for either a letter-grade or auditing
- Not take on any leadership role in the program

Family members who enroll as participants will count towards the enrollment minimum of the program.

Family members who do not enroll as program participants are considered "accompanying family members." When there is an accompanying family member, program leaders must:

- Remember that their family members are not considered in any way to be participants or leaders in the program or representatives of Truman or any affiliated institution. Accordingly, family members/companions may not have any official duties (chaperone, driver, assistant) or participate in events or use transportation paid for by Truman.
- Family members/companions are not protected by Truman's liability insurance for any actions taken abroad. Truman is not responsible for the injury, illness, loss, or death of spouses, partners, or children accompanying participants in study abroad programs, nor will any expenses for unaffiliated travel be collected or distributed by Truman. Leaders are, therefore, urged to discuss applicable liability protection with an insurance agent to ensure that they have adequate coverage for their overseas activities.
- Keep in mind that the workload for travel programs is much higher than teaching a course on campus. The faculty leader's first priority is to be available to the students in an emergency (or perceived emergency) 24 hours a day, 7 days a week, when the program is in session.
- Be responsible for any travel expenses incurred on behalf of family members/companions. The faculty leader should maintain careful records to ensure separation of expenses. Any additional costs incurred due to stopovers, route modifications, or mode of transport made for the convenience of the family members/companions will be the leader's responsibility.
- Know that CIEA cannot assist with housing, child care, health care, travel arrangements, or any other necessary support for spouses, children, partners, parents or friends that accompany



program participants. Accompanying family members on a study abroad program must not hinder or detract from any student's academic or cultural experience abroad.

- Decide in advance what level of participation the family member will have with the group and clearly communicate this plan with the students enrolled in the program.
- In their request, faculty/staff must include specific details about the accompanying traveler(s) and how their presence will not interfere with the employee's work responsibilities. Faculty/Staff requesting permission to bring minor children to the program site must arrange for 24/7 care and emergency support by someone not employed by the program in any way.
- At the conclusion of the program, students will be asked to assess the impact of the presence of faculty/staff family members. If feedback indicates a negative impact, permission may not be granted for future programs.
- The course leader is responsible for enrolling the accompanying family member in the Safe Traveler Enrollment Program (STEP) prior to departure

Both participating and accompanying family members require the approval of the Executive Director of International Education.

#### 4.1.5: Nature of Leader-Participant Relationships

At all times, from initial recruitment through the conclusion of a program, the course leader is responsible for observing all Truman guidelines for appropriate platonic relationships with students.<sup>37</sup> Failure to follow Truman policy while interacting with students on a faculty-led program will result in disciplinary measures.

In order to avoid a situation in which a complaint of sexual harassment is filed, CIEA encourages course leaders to maintain strict personal boundaries with students, committing to avoid even the appearance of impropriety. CIEA suggests that course leaders not be alone with individual students and not show favoritism to certain students or groups of students. If it is necessary for a course leader to meet with an individual student away from the group, he or she should be in a public location such as a hotel lobby. The course leader should avoid meeting with students within their accommodations.

However, it should not be forgotten that course leaders are encouraged to maintain relationships of a professional nature with their students. Such relationships enhance the study abroad experience and overall educational experience of Truman students.

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<sup>37</sup> As articulated in the *Board of Governors Code of Policies*, Chapter 6: <https://www.truman.edu/about/our-people/board-of-governors/board-of-governors-codes-of-policies/> and the *Faculty Handbook*: <http://facultyhandbook.truman.edu/>

## 4.2: Marketing and Recruitment Techniques

### 4.2.1: Promotional Roles and Responsibilities

Promoting a faculty-led program is primarily the responsibility of the Program Director(s), but is accomplished with the support and guidance of CIEA.

Program Directors are responsible for:

- Committing to a good faith effort to fully enroll their program and continuing earnest recruitment efforts even after the minimum enrollment has been reached
- Creating an overall promotion, marketing, and recruitment strategy to connect with eligible students (especially those in the main target group) and maximize program enrollment
- Using a range of marketing techniques to engage students and taking advantage of CIEA resources (such as attending the study abroad fair, directing students to the study abroad website, etc.)

CIEA will support Program Directors by:

- Creating an individual program webpage for every course that includes information about the program's academics, itinerary, leaders, and official pricing information
- Assisting programs to create a poster and other marketing materials, as requested
- Generally promoting all faculty-led programs and study abroad at Truman and providing opportunities (such as the study abroad fair) for Program Directors to promote their program
- Advising students interested in studying abroad and study away opportunities and connecting them with Program Directors
- Offering additional assistance to Program Directors as requested to plan and organize marketing events or strategies, as requested

CIEA's general promotion efforts alone are not enough to enroll a course successfully. Program Directors must engage students, both through marketing and one-on-one conversations, for recruitment to be effective. There is no better recruitment tool, in fact, than a Program Director who is excited about his/her program. Leaders represent not only the fundamental value of the program (e.g., academic credit), but are also the guide to new experiences. Students need to be able to interact with the person who will lead them in this venture, gain confidence in them, and understand the opportunity provided by the program.

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

Promotion can begin as soon as programs have preliminary approval (as long as any communications include a disclaimer that the program is "pending administrative approval"). In most cases, this should start in the Spring semester the year before the program runs before students leave for the summer.

#### 4.2.2: Program Web Page

CIEA will work with the Program Director to create a dynamic web page that will showcase course information, program inclusions and itinerary, and eligibility requirements, using a standard template customized to suit the program. Additional information can be added, such as: testimonials, videos, photo slideshows, links to the academic unit's web page, and any other relevant information. The program website will also act as the official source for program pricing information, kept up to date by CIEA in accordance with any administrative approvals. Program Directors should always direct students to the webpage for official pricing information. Much of the information for the program webpage is gathered during the proposal and approval process, but CIEA will reach out to Program Directors if additional information is needed and ask Program Directors to review a draft of the webpage before it is published.

#### 4.2.3: Program Poster

CIEA encourages all faculty-led programs to have a program poster. These posters can be placed on the many bulletin boards across campus and also used as a template for the screen advertising throughout many of the buildings on campus. Poster designs help to “brand” the program and allow it to enter students’ general awareness before they see other forms of marketing for the program. CIEA will cover poster costs and Publications can design and produce the posters. CIEA can advise Program Directors on the information to include on these posters and provide pictures from previous year’s trips, when available. CIEA must approve the design of the poster and will ensure that essential information—including a link to the program website and CIEA branding—are always present.

#### 4.2.4: Other Marketing Publications

Program Directors can create their own marketing publications or request the assistance of CIEA. Any published or printed marketing materials must be approved by CIEA for review before printing, which can help to ensure the accuracy of information and check for potential liability issues in marketing.

#### 4.2.5: Marketing Plans and Tools

A plan for marketing an individual program is largely at the discretion of the director, who may choose a variety of means to reach and engage students. The following list shares some methods used by leaders in the past. This list is not meant to be limiting or exhaustive. And while also not meant to be a checklist, experience does show that using a variety of means, rather than just one, is often more effective for engaging potential participants. Also, remember that CIEA is available to help assist leaders with promotion, upon request, so let us know how we can help.

- Classroom presentations and discussions: talk to your students about the program, identify classes where you can reach students who would be most interested, ask for 5 minutes to do a presentation, send a previous participant, or ask your colleagues to speak on your behalf to their students, share pictures and testimonials whenever possible
- Faculty: make an announcement at an all-faculty meeting or ask your chair or dean to share at their meetings, bring your department on board in helping promote
- Flyers and posters: ask CIEA to help get these made, Publications can do the design with just some simple information and pictures, poster in your department and any other target departments, but also don't forget public areas like the Rec Center, library, and dorms

- Social Media: does your department have a Facebook page or Instagram account? Or do you? Post pictures, testimonials, and notices for information sessions, etc. Start a Facebook group and invite interested students to join, post pictures and other updates or information sessions
- Listserves/Departmental announcements/Campus TVs: Think about departments, honors societies, leadership and cultural programs, fraternities and sororities, or other organizations or departments that have listservs or other means of sharing about your program,
- Campus TVs: posters and announcements can be shared on TVs in buildings across campus
- Study Abroad Fair – Program Directors will be asked to participate in the study abroad fair during the fall semester. Sign up for a table to promote your program.
- Study Abroad web page – CIEA will create a web page to promote your program; make sure to include the link on your marketing materials or presentations
- Student media, newspaper, radio, TruView banners, Truman Today – put a blurb or advertisement in some or all of the various student publications or campus announcements
- Events/information sessions – use an interactive event with food or giveaways to get students excited about your program, do a brown bag lunch for your department, residence hall, or SUB
- Connect with the Center for Academic Excellence and provide promotional materials to academic advisors to distribute to interested participants
- Table at the SUB – you can reserve your own table or, upon request, use CIEA’s table to promote your program

As leaders promote their program, they should also keep the following tips in mind:

- Think carefully about your target audience – what classes are they likely to be in? What campus events will they be at? Be smart about where you focus your efforts
- Use media and testimonials – pictures, movies, quotes, and testimonials are great ways to help students get excited about what they will experience and gain from a program
- Invite previous participants to be involved – the excitement and insights of previous participants can be extremely motivating for potential applicants, plus it gives the previous participants a way to continue integrating their learning from the program
- Invite others to help you promote – sharing program materials with student clubs or organizations can multiply your efforts to get the word out

#### 4.2.6: Marketing Message Considerations

Both the explicit and implicit messages communicated through the marketing and promotion process form the foundation of student expectations about the program. Program Directors who overly emphasize their program as an “amazing trip” may later come to regret a group of participants who do not take the academic content of the course seriously enough (or vice versa). Additionally, there are important issues of liability to consider in marketing a program, since the Program Director acts as a representative of Truman State University in their promotion of programs. For instance, Program Directors need to be thoughtful about how they talk about the price of the program and the activities involved, especially since itineraries can often change without notice on faculty-led programs. When information is unknown or the accuracy of information or policies is in question, leaders should direct students’ questions to CIEA or other relevant administrative offices on campus. So, as Program Directors begin to market their programs, the following are some messaging considerations to keep in mind:

- How expectations of “fun” and “serious academics” are being balanced and communicated to potential participants
- What expectations are being communicated with students about their behavior abroad, the kind of group experience being sought by the leaders, and the amount of independence and free time allowed
- Beginning the academic teaching process by articulating connections between the location and course content, sharing about local culture
- Sharing excitement and enthusiasm through concrete examples and media
- Reporting accurate and approved information about the course (including number of credits and what they will count for, pre-requisites, and the academic content)
- Setting academic expectations by reiterating that the program is for academic credit, clarifying assignments, and explaining how students will be evaluated and graded
- Explaining the demands and requirements of the course consistently to all interested students, including any potential physical and mental demands, language requirements, etc.
- Ensuring that interested students know where to go and how to begin the application process if they desire, the deadlines involved, and the advising resources available through CIEA
- Sharing the estimated program costs and inclusions and the website as the authoritative place for the price of the program and information about payments, encouraging students with Financial Aid questions to consult directly with the Financial Aid Office
- Ensuring that communications conform to CIEA policies as found on the CIEA website and in this document, and not attempting to be an expert on anything the leader is unsure about, but instead directing students to CIEA
- Ensuring that students are advised accurately regarding the program’s applicability to their degree requirements or graduation plan or referring the student to their academic advisor or the Registrar for accurate advising

### 4.3: Liability Issues and Important Topics in Recruitment

#### 4.3.1: Liability Waiver

As a part of their application, all participants must sign a liability waiver called the “Assumption of Risk and Release” (found in Appendix A). Using a liability waiver is an effective method of disclosing risks to students and parents. Program leaders should read through this document in advance of promoting their program and echo the various risks contained in it to participants, so that students are made aware of these risks at the earliest point possible in their consideration of the program.

#### 4.3.2: Communication and FERPA

The Family Educational Rights and Privacy Act of 1974 (FERPA) regulates the dissemination of all student information throughout the program, including academic, disciplinary, and medical records. As a part of the faculty-led program application, students must provide emergency contacts and sign a FERPA release that authorizes CIEA and the Program Director(s) to discuss the student’s information and records as needed with these emergency contacts, with partners and third-party providers, and with government agencies. Given the sensitive nature of student information and records provided in connection with faculty-led programs, Program Directors and CIEA staff must take care to share information in accordance with a student’s completed FERPA release.

### 4.3.3: Communication about Program Status

Leaders must accurately represent the current approval status of their program to students. Leaders are welcome to discuss faculty-led programs with potential participants at any stage in the program's development, but must always indicate the stage of approval in their communications with denotations such as "program is in development and has not yet received approval" or "program is scheduled for Summer term pending approval." Even after a program has received preliminary approval, leaders should not assure students that a program is "guaranteed" to go, keeping in mind the confirmation status of the program that depends on sufficient enrollment and the uncertainties inherent to international travel.<sup>38</sup> CIEA retains the right to cancel a program at any time and for any reason.

### 4.3.4: Communication about Physical and Cultural Challenges and Disabilities

#### 4.3.4.1: Health and Physical Demands

Program leaders should not prejudge a person's ability to participate in a program or discourage them from applying. Rather, program leaders should be transparent and explicit in their marketing efforts about the pace of travel, the comfort level of the lodging, any specific health concerns (such as high altitudes, etc.), and the functional capabilities required to participate in the program (such as need to be able to independently traverse rocky terrain, climb stairs, navigate an urban or unimproved rural environment, engage in discussion of emotionally charged course content, etc). Program leaders should never offer medical advice to students. Participants must make their own decision, in consultation with medical professionals, about whether or not to apply, and should then be judged according to clearly established acceptance criteria used for all applicants.

Once students have been accepted, CIEA asks them to submit both a medical clearance form and a pre-departure health disclosure, which inquires about any history of physical or mental illness, dietary restrictions, allergies, or any other health issues that might inhibit the student's ability to participate fully in the course. This process exists to identify any potential issues prior to departure and aid leaders in assisting students, should the need arise, while abroad. We cannot force students to self-disclose this information but most students understand the request is intended for their wellbeing.

#### 4.3.4.2: ADA and Accommodations

The Americans with Disabilities Act (ADA) specifically prohibits discrimination against disabled students, but this applies only to the U.S. and U.S. territories. Due to constraints of environment and laws in foreign destinations, not all accommodations requested can be provided on study abroad programs. Leaders should clearly communicate the demands and conditions of the program, but under section 504 of the Rehabilitation Act of 1973 and the Americans with Disabilities Act, study abroad organizations cannot inquire about an applicant's disability prior to having accepted that person into the program. Applicants with disabilities should be evaluated based on the same qualifications as any other potential participant. Once accepted, students who believe they would need accommodations to participate in the program should make their request to CIEA and Student Access and Disability Services, which can coordinate to research the availability and cost of reasonable accommodations. Truman will make a good faith effort to provide access to reasonable accommodations for students studying abroad, but available accommodations cannot be guaranteed and any additional cost (e.g. for Sign Language interpreters, personal assistants) may be the responsibility of the student.

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<sup>38</sup> See section 4.4.3: Student Payment and Cancellation Conditions for more information about program confirmation

### 4.3.5: Communication about Graduation Plans

Students sometimes apply to study abroad or study away on faculty-led programs during the term following their intended graduation date at Truman (e.g. a senior intending to graduate in May applies for a May Interim or Summer term program following graduation). Students in this situation are allowed to participate in faculty-led programs. However, they should be aware of the following common issues:

- Students who intend to graduate and then study abroad or study away will not be eligible for financial aid
- Students who intend to delay graduation (to August or December graduation) should be aware that:
  - They may not be eligible for financial aid, including Truman Scholarships, during the term. Students are not allowed to use financial aid during a final term if they have already completed all graduation requirements.
  - It is not always possible to receive grades back from faculty-led programs in time to qualify for August graduation. The timing of grades should be discussed with the Program Director at the time of application, to see if this will be possible

CIEA and Program Directors should encourage any student participating in a faculty-led program during a final term or after graduation to discuss their plans in detail with the Coordinator for study abroad, the Program Director, Financial Aid, and the Registrar during the application process. This ensures that students have a clear understanding of what is possible in their situation and that all administrators involved understand what the student's plans are.

### 4.3.6: Communication about Program Costs and Money

#### 4.3.6.1: Pricing Information

Using the draft budget, CIEA will publish estimated program prices when a program is approved to the program webpage. When a final budget has been completed, the website will be updated to reflect a fixed cost. This cost, typically published by the beginning of the fall semester in the year when the program will run, is final and will not change. Situations which would require the price of the program to change would prompt a re-evaluation by CIEA as to whether the program is viable, and students may be given the option to withdraw from the program without penalty if a program's price must be increased.

Fees listed on the website will come with required disclaimers to make clear the nature of the pricing presented there. They also make explicit what aspects of the program are covered in the fee and which aspects will need to be paid out of pocket by students. Program leaders should advise students to look directly at these pages for information about pricing, and should not reprint pricing without the disclaimers listed on the webpage. If promoting the program before finalized fees have been established, program leaders should avoid giving students their own "ballpark" estimate for the cost of the program, but instead refer them to the study abroad webpage for the course, where costs will be published when available.

#### 4.3.6.2: Financial Aid

Sources of financial aid for faculty-led programs differ somewhat from those available during regular terms. Certain forms of financial aid available during the fall and spring semesters may be either unavailable or have different conditions. However, at least for faculty-led study abroad programs there are also additional forms

of funding specifically designed for study abroad. Information about sources of financial aid for faculty-led programs can be found on the study abroad website and in fliers available from CIEA.

Program leaders may speak in general about these forms of financial assistance, but since every student's situation is different, they should always advise students to talk through their specific needs and situation directly with CIEA and the Financial Aid Office. Program leaders should never promise or guarantee that a student will receive any form of financial aid, or that any particular program is always within financial reach for every student. While leaders and CIEA staff can advise students and point them towards resources, it is ultimately always the responsibility of the student to make financial arrangements for program payments and seek assistance from their financial aid advisor.

#### *4.3.6.3: Foundation Scholarships for Study Abroad*

Due to the generosity of donors through the Truman Foundation, Truman has a number of foundation scholarships designated specifically for faculty-led study abroad programs. Each year, CIEA will establish and announce scholarship procedures and timelines in advance. The main criteria for most of these scholarships is financial need, though secondary factors include students' essays and motivations. Program leaders should be careful not to make any promises about scholarships to students. CIEA will inform Program Directors regarding which students registered for their program have received scholarships.

#### *4.3.6.4: Financial Risks for Students*

As faculty-led programs can involve many unpredictable circumstances, students participating in these programs can experience a range of financial risks. CIEA works to mitigate these risks wherever possible and to carefully inform students regarding various risks and payment conditions. One way major risks are mitigated is through the required CISI insurance for the program,<sup>39</sup> under which all participants are covered. However, students may also have additional uncovered risks, including out-of-pocket expenses, made in relation to the program and non-refundable program payments which are unrecoverable<sup>40</sup> if the student withdraws from the program. Students should be reminded that they bear responsibility for acquiring additional financial instruments or insurance for the program from third-parties if they do not feel that the coverage offered for the program is sufficient to meet their individual needs.

Two particular financial risks merit further explanation: out-of-pocket expenses and non-refundable payments to Truman. First, Truman will not reimburse out-of-pocket expenses made by students in relation to the program, regardless of whether the student withdraws voluntarily from the program or if Truman cancels the program. These expenses might include passport fees or the purchase of items such as cameras, luggage, etc. for use during the program. Additionally, students will not be reimbursed for individually purchased airfare to and from the program destination, even when this is required for participation in the program. To mitigate this risk, students should be encouraged to carefully consider the cancellation terms for any flights they purchase and consider buying flights with low cancellation fees or purchasing appropriate trip insurance. Additionally, students must be advised to delay purchasing their own program airfare until the program has been confirmed by CIEA. If a student insists on purchasing their airfare before the program has been confirmed, leaders should put in writing to the student (copying the Coordinator for faculty-led programs) that purchasing his/her airfare is against the faculty leader's recommendation, as the program has not yet been confirmed.

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<sup>39</sup> For more information, see section 5.2.3.4: Insurance Coverage for Study Abroad

<sup>40</sup> For more information, see section 4.4.3: Student Payments and Cancellation Conditions



Second, students make a financial risk as they make non-refundable payments to Truman State University for the program. Many national insurers offer travel or trip insurance by which students could recover these non-refundable payments in the event that they must cancel their participation in the program. Students concerned about taking on the financial risk of non-refundable payments or concerned that they may need to withdraw after these payments have been made are responsible for deciding whether to purchase a financial instrument to mitigate this risk. Truman does not provide this insurance or endorse any provider.

#### *4.3.6.5: Post-Program Partial Refunds*

Program leaders should neither promise nor discuss potential partial refunds from funds remaining at the end of a program. This mandate should be observed both during the promotional phase and during the program abroad. For instance, if an event has to be cancelled during the program or a student misses an event due to illness, it should never be suggested to students that they will receive their money back for these changes. In addition to the fact that such refunds can never be guaranteed, even discussing them as a possibility with potential participants can create expectations that may lead to disappointment and dissatisfaction with the experience or its cost after the fact. When there are funds remaining at the end of the program, it is at the sole discretion of CIEA to decide whether or not a partial refund will be issued to students and in what amount. CIEA will make this decision in consultation with the Comptroller after evaluating the total financial picture of CIEA and faculty-led programs for the year. When refunds are granted, amounts will be the same for every participant in the program.

#### *4.3.7: Communication about Deviations and Alternate Travel Plans*

Occasionally some participants request to deviate their personal itinerary in some way from the group (such as getting a different flight from group flights, taking a side trip, extending their travel after the program, or having guests visit or join the program for a period of time). In general, all such deviations should be highly discouraged. It is part of the nature of faculty-led programs that itineraries tend to be highly prescribed, in order to create a focused experience. Program leaders fielding questions about deviations should encourage students to embrace the program for what it is and leave separate travel plans for another time. Students who wish to have a less prescribed experience with more independent travel opportunities should be encouraged to investigate alternative experiences for study abroad, such as a summer or semester program, through one of our third-party partners.

##### *4.3.7.1: Guests Abroad*

Sometimes students desire to meet with family member(s) or friend(s) living or traveling abroad during the program or have such visitors join the group during program activities. These visits are strongly discouraged, due to their potential risk to the program members and general interference to the itinerary. The course leader should not enable or encourage their occurrence and has full authority to grant or deny visits during student free time. In any situation where program leaders wish to approve such visits, they should consult first with CIEA as far in advance of the program as possible. If the guests desire to meet up with the group, they may not benefit from any of the pre-paid arrangements – this includes using group transportation, attending guided experiences by a contracted provider, staying with a student in group lodging, etc. They must always make their own arrangements as travelers.

#### 4.3.7.2: Flight Deviations for Group Flights

When a program uses group travel, CIEA and the Business Office will not entertain requests for travel deviations. First, the availability of deviations for group travel always depends on the number of travelers and the conditions set by the airline from which tickets are purchased (neither of which are known in advance). Second, if students were allowed to opt out it could affect the pricing for the rest of the program participants. Third, Truman does not have the administrative capacity to handle these requests. Finally, deviations have the potential to disrupt the program for other participants and create an additional burden on Program Directors. However, in some cases students have successfully negotiated their own flight deviation directly with an airline after group flights have been purchased. CIEA will allow students to do this, subject to the following conditions: 1) deviations may only be made for the returning flight (no front end deviations), 2) the Program Director must agree to the deviation in advance, and 3) the student must sign a travel deviation waiver from CIEA indemnifying Truman of all responsibility for the student following a specified departure time. Students who make deviation arrangements without prior permission from their Program Director and CIEA are subject to removal from the program and forfeiture of all program payments.

### 4.4: Application and Payment Process for Students

#### 4.4.1: Application Process Overview

The process of applying for a faculty-led program follows the following basic steps:

- 1) Students fill out the Study Abroad Application through TruView and pay a \$200 deposit at the time of application and no later than the application and deposit deadline
- 2) Once the application and deposit have been received, student applications are reviewed by CIEA and passed to the Program Director(s) for approval
- 3) Program Director(s) either review and approve applicants immediately OR may request additional application materials or requirements before making an approval decision (these additional steps should be arranged with CIEA in advance)
- 4) Once approved, students complete confirmation requirements and the make the confirmation payment by the confirmation deadline
- 5) Confirmed students complete pre-departure preparations, make any remaining payments by the final payments date, and submit any additional requested materials from instructors or CIEA
- 6) Students who have completed all steps will be officially enrolled in the course by the Coordinator approximately 1-2 months prior to departure

##### 4.4.1.1: Deadlines

Deadlines serve two important functions in upholding faculty-led programs. First, deadlines are permanent guides to marketing and recruitment, and provide a benchmark for Program Directors and CIEA. Second, deadlines also help to gauge student commitment to a program and ensure funds are collected to make necessary and on-time payments to third parties. Deadlines will only be extended with the prior approval by the Executive Director for International Education.

Each year, faculty-led program deadlines will consist of the following due dates, with specific dates designated each year:

- Application and Deposit Deadline
- Confirmation Deadline
- Final Payment Deadline

*Application and Deposit Deadline:* By this date, students must complete a Study Abroad Application on TruView and pay the program deposit of \$200.

*Confirmation Application Deadline:* By this date, students must confirm their intention to participate in a faculty-led program by making the confirmation payment—a substantial payment of at least 50% of program costs. Also, by this date students must complete any additional application materials (including those required by the Program Director and CIEA) and be approved by the Program Director. The confirmation payment is non-refundable after the confirmation deadline passes. Students who have applied but fail to make the confirmation payment by the deadline may lose their spot in the program.

*Final Payment Deadline:* By this date, the remainder of the program cost must be received from the student in full. If a student has not completed all program payments by this date, they may be removed from the program without a refund.

#### *4.4.1.2: Study Abroad Application on TruView*

CIEA collects application information from students in two stages. First, students complete the online Study Abroad Application available through TruView. This must be completed and a program deposit of \$200 paid by the application and deposit deadline. After this application has been completed, reviewed by CIEA, and approved by the Program Director(s), CIEA may request several additional documents that must be received by the confirmation deadline along with the confirmation payment.

The Study Abroad Application can be found at [truview.truman.edu](http://truview.truman.edu) > Tools > Student > Student Tools > Registration > Apply to Study Abroad. This application is used for both study abroad and study away faculty-led programs. It gathers and collects the following information:

- Two general short answer questions (What do you hope to gain from studying abroad [personally, academically, and professionally]? and Why is this particular study abroad program the best fit for you?)
- Foundation Scholarship questions (required only ahead of the early application deadline for those who wish to be considered for Foundation Scholarships)
- A registration agreement for the term
- Passport information (when already available)
- Two emergency contacts
- A general assumption of risk and release
- A media release

Applications will not be reviewed until CIEA has received an application deposit of \$200. After the application has been reviewed by CIEA and approved by the Program Director, applicants will receive a follow up email informing them that they have been conditionally accepted to the program. This acceptance is conditional on the completion of the following items by specified deadlines:

- A completed medical authorization form
- A completed medical disclosure form
- Receipt of the confirmation payment
- Copy or scan of photo page of passport and any visas (study abroad only)
- Attendance at all required pre-departure sessions for the program
- Copy of flight itinerary (for programs with individually purchased flights)

#### *4.4.1.3: Program Leader Role*

CIEA will work for a quick turnaround on applications from the time when they are received and the deposit is paid to review and pass to the Program Director. For their part, Program Directors should review and approve applications in a timely manner to avoid delays in the application process for students. CIEA will work out the application process with Program Directors on a program by program basis, especially in cases where Program Directors wish to add additional steps to the process (such as a recommendation, interview process, or additional forms or materials).

Program leaders will be copied on the acceptance emails sent to students by CIEA after they have been approved. It is recommended that course leaders send an e-mail message to students at this point to introduce themselves and share any additional program-specific information, as these kinds of communications can help improve retention.

#### *4.4.1.4: Interviews*

Some instructors choose to conduct individual or group interviews as part of their application process. These interviews have benefits, as they are a time when instructor and applicant get to know each other, students can be informed individually of program expectations, and students may also have space to ask specific questions to develop their personal readiness to participate in the course. At the same time, interviews can be time consuming and some of the same benefits can also be achieved through the recruitment process. Whenever interviews are incorporated into the application process, those conducting the interviews must work to ensure uniform practices so that all applicants are treated equally in the process. Additionally, in order to save time, it is recommended that interviews only take place after the student has completed a study abroad application.

#### *4.4.1.5: Red Flags and Rejecting Applicants*

While historically the vast majority of students applying for faculty-led programs at Truman have been accepted, there are certain situations where it is appropriate to either investigate red flags that emerge with a student, and/or reject them from the program. The following are some examples of possible red flags:

- A history of disciplinary infractions
- Lack of suitable academic background for the program
- Student's essay indicates that the primary motivation to study abroad is questionable (desire to escape a situation or person, focus on travel or extended vacation, for others to visit or accompany them abroad, etc.)
- Student's academic record shows recent drastic decline in academic performance, breaks in attendance, multiple absence/failing reports, or repeated no-shows
- Student demonstrates erratic or inappropriate behavior in her or his interactions with faculty or CIEA staff (before or after acceptance into the program)

CIEA and Program Directors will work together to identify “red flags” as they appear in application materials or interactions with a student and collaborate to determine the appropriate course of action. This may include a student interview, follow up with a faculty recommender, notifying and/or referral to counseling services, or discussion with the Executive Director for International Education.

In any case where a Program Director is considering rejecting a student from their program or notice red flags, they must consult with CIEA as soon as possible and always before making any final decisions. It is important that any student who is rejected be done so on the basis of clear criteria that have been consistently and equitably applied to all applicants.

#### 4.4.2: Application Follow-Up Steps

##### *4.4.2.1: Immigration Documents (Passport and Visa)*

All participants in faculty-led study abroad programs must have a passport. Any entry or exit requirements related to the host country or countries where a layover may occur should be investigated during the initial planning for the program. Any visa or permit costs should be communicated to students as out-of-pocket expenses. Information about visas can be found on the embassy website for the host country.

Travelers are responsible for ensuring that they have a passport valid for at least six months past the end date of the program. Students without a passport should be encouraged to apply for one during the application process to ensure it has been received well in advance of the program’s departure. Students will be required to submit color copies of the photo page of their passport to CIEA before departure.

The majority of the participants in Truman programs will be U.S. citizens, but some may not be. Non-U.S. citizens may have different travel requirements to the program destination. Obtaining visas for non-U.S. citizens can often be a lengthy process and may affect the student’s participation in the program if it is not dealt with in a timely fashion. The Coordinator can advise international students in these matters.

##### *4.4.2.2: STEP*

The Smart Traveler Enrollment Program (STEP) is a free service provided by the U.S. Dept. of State to assist U.S. citizens traveling internationally. All participants in faculty-led programs are required to register in STEP. Enrollment in the program allows the Embassy in the destination country to provide important information about safety conditions and contact travelers in the case of an emergency.

##### *4.4.2.3: Travel Health Consult and Medical Authorization Form*

All students are required to have a travel health consult and receive authorization from a licensed healthcare professional to participate in the program prior to departure. The medical authorization form asks a medical professional to provide the student with medical travel consultation related to managing any ongoing health concerns and medications while abroad, ensure the student is educated regarding any CDC recommended vaccinations for the destination, and confirm that the student is medically fit to participate in the program.

Students may have the form completed by a health care provider of their choice. Students should bring their flight itinerary and syllabus to the appointment. Students will need to check with their insurance providers for possible coverage of any necessary vaccinations.

Course leaders should never discourage students from following recommendations received during a travel consultation (i.e. receiving recommended vaccinations, etc.). Program Directors should also be aware of health issues and required or recommended immunizations for the destination country. The Centers for Disease Control website provides detailed health and immunization information.

#### *4.4.2.4: Voluntary Health Disclosure*

In addition to the medical authorization form, students are required to complete a health disclosure form prior to departure. This form asks students to voluntarily disclose any ongoing physical or mental health issues, medications, allergies, and dietary requirements in order to help the Program Director assist them should the need arise abroad. This information will only be shared with CIEA staff and the Program Director as needed and will be destroyed following the program. Program Directors will receive this information from the Coordinator prior to departure and should review it ahead of departure. If anything disclosed concerns the Program Director, they should consult with CIEA about having a conversation with the student prior to departure to discuss these concerns.

### **4.4.3: Student Payments and Cancellation Conditions**

#### *4.4.3.1: Payments and Schedule*

Students pay for faculty-led programs according to a schedule established by CIEA. Due to the way in which students are enrolled in faculty-led programs, program charges will not typically appear on student bills until after they have completed all of their payments and are enrolled in the course (typically 1-2 months prior to departure). Therefore, it is important that students complete payments according to the published schedule of payments, which is advertised on the program website and communicated by CIEA to students after their acceptance into a program. Payments should be made directly to the University Cashier.

The cost of a faculty-led program is broken down into smaller payments, both to assist students in making payments and to establish a schedule of progressive commitment to the experience:

- **Program Deposit:** Students start by paying a program deposit of \$200 at the time of their application to secure their spot in the program. This payment applies to the total cost of the program when a student makes the commitment payment. The deposit is refundable if a student decides not to commit to the program and withdraws the application before the commitment deadline. After the commitment deadline, this deposit becomes non-refundable.
- **Commitment Payment:** Next, students make a commitment payment. The amount is equal to at least 50% of the remaining program cost and covers all advance payments to third-parties. This payment is used to confirm that the program can go even if there are later withdrawals from the program. It is non-refundable after it has been paid.
- **Final Payment:** The remaining program cost is due by the final payment deadline. It is non-refundable after it has been paid.

#### *4.4.3.2: Cancellation and Refunds*

There are two situations under which CIEA will cancel a faculty-led program. The first is cancellation ahead of or as of the confirmation deadline, typically due to insufficient enrollment. This occurs when a program fails to reach the minimum number of confirmed participants by the confirmation deadline or when other events lead a program to have to be cancelled before it is confirmed. Since program funds are never spent until the

program is confirmed, participants in programs cancelled before or as of the confirmation deadline will all receive a full refund of all program fees they have paid to that point. The second circumstance is cancellation due to unforeseeable circumstances after a program has been confirmed. While CIEA attempts to avoid cancellation wherever possible, there are certain times when it is unavoidable, such as global pandemic, changes in local conditions, or even if a large number of late withdrawals makes a program financially non-viable. Under these circumstances, CIEA will issue all participants a refund of all program fees which have not already been paid in non-refundable payments to a third party vendor. CIEA will do its best under such circumstances to recover all costs and mitigate any losses for students, but cannot guarantee a full refund. In the extremely rare event that a program were cancelled while in progress, the Executive Director of International Education, in consultation with the VPAA, the Comptroller, and University Counsel, would review the circumstances and make a determination regarding any refunds.

Refunds for students who voluntarily withdraw from a program will vary depending on when they withdraw, according to the following guidelines:

- Withdrawal before the confirmation deadline: all payments, including the application deposit and confirmation payment, will be fully refunded (if already made)
- Withdrawal after the confirmation deadline but before final payment deadline: application deposit and confirmation payment will not be refunded. Final payment will be refunded if already made
- Withdrawal after the final payment deadline: no refund of any payments

Students who wish to withdraw must make their withdrawal official by completing the withdrawal form on the study abroad website. CIEA will consider a withdrawal official on the day the form is submitted, and will follow up with students with a withdrawal email detailing all withdrawal policies.

Finally, students who are dismissed from the program due to disciplinary or other issues will not be entitled to a refund of any program payments and will additionally be responsible for all additional expenses related to their early departure from the program.<sup>41</sup>

#### *4.4.3.3: Discounts*

Participants in faculty-led programs who are eligible for tuition discounts on campus (faculty/staff, faculty/staff family, senior citizen, etc.) may apply these discounts towards faculty-led program enrollment fees. These participants will count as full participants towards the enrollment of the course for the purposes of calculating salary. Discounts do not apply to other faculty-led program fees such as the course fee, insurance fee, travel fee, or housing fee.

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<sup>41</sup> For more information on program dismissal, see sections 5.2.4.3: Discipline (establishing standards prior to departure) and 6.1.5: Disciplining and Dismissing Students (enforcing standards during the program)

## PHASE FIVE | PREP

The process of preparing a group begins even as participants are recruited. The previous section explored the importance of careful communication and expectation setting from the first moments that students begin to learn about a program all the way through their application and acceptance. However, as the recruitment of the group comes to a close, the essential work of preparing that group to travel abroad together begins. With faculty-led programs, the higher degree of the experience's intensity and the enhanced role of group leaders make preparation to function well as a group even more important. In this section, we talk about various aspects of preparing groups to go abroad, everything from academics and safety to behavioral issues and logistics.





## Checklists for Phase Five: Prep

### *For Program Leaders*

- Complete CIEA's Program Director workshop on emergency procedures (typically in the Spring)
- Establish communication channels for the group where participants connect to leaders and one another before travelling abroad
- Research essential local information including culture, laws, and emergency resources
- Review Crisis Management Procedures and the various disciplinary procedures found in this *Handbook* and develop program-specific written plans for safety and behavioral expectations
- Plan, communicate, and host two (2) or more mandatory pre-departure sessions for the group. Notify the Coordinator of these meetings and invite them to attend at least one session to cover safety, health, insurance, and emergency information.
- Communicate and verify the attendance of all program participants at mandatory pre-departure sessions to CIEA
- Obtain and submit personal immigration documents (passport and visa where applicable to CIEA, encourage students to do the same)
- Consult CDC health and vaccination recommendations and healthcare professionals to make plan for personal health management, encourage students to do the same
- Read and review all information contained in the final pre-departure emails from CIEA, including: emergency information, medical disclosures, etc.
- Sign and complete P-card form prepared by CIEA at least six weeks prior to the trip departure date, pick up, and use in accordance with Truman Policy (if needed); discuss budget with Coordinator

### *For Study Abroad Coordinator*

- Host Program Director workshop on emergency procedure for leaders in the Spring
- Attend one of the each program's pre-departure sessions to speak about safety expectations, physical and mental health preparations, insurance, and emergency procedures. Be available upon request for additional pre-departure session assistance
- (When there are group flights) Communicate group flight details to the program leader and group as soon as possible
- Advise students and leaders regarding the appropriate immigration documents needed for the trip and collect copies of immigration documents for all program participants
- Enroll all participants in CISI insurance and send enrollment info to all participants
- Send final pre-departure emails containing essential program and emergency information (including Embassy information) to all participants and program leaders at least one month in advance of departure
- Provide Program Directors with expense reconciliation forms and P-Card forms (if needed) and discuss budget availabilities
- Share emergency information (immigration documents, emergency contacts, and health disclosures) with Program Directors prior to departure
- Ensure payments are made to vendors in accordance with established contracts and in collaboration with the Business Office

## 5.1: Communication and Convening the Group

Group leaders are encouraged to begin establishing communication channels for the group as early as possible in the process. While students will receive various emails with essential information and instructions from CIEA as they move through the application process, it is also beneficial to establish lines of communication between the program leader and students and also between program participants. Establishing a group rapport early helps students to begin to develop relationships with one another and the leader that help the group function better abroad and it can also help with student retention through the application and payment process. Program leaders have used a variety of communication methods in the past, from group emails to Facebook, Groupme, or WhatsApp groups.

For May Interim and Summer programs, groups should be more or less formed by the time the Spring semester begins and program leaders should have a plan for convening the group in a series of pre-departure meetings. This plan should be explained in the program syllabus and communicated to students as they are recruited so that they understand the level of commitment and time that will be asked of them during their regular semester. We recommend that program leaders remain flexible with regards to the exact timing of these pre-departure sessions to accommodate the schedules of the group that forms. While every course is different, every program must have at least two (2) mandatory pre-departure sessions to communicate essential information and establish group rapport and expectations. Program leaders should invite the Coordinator to attend at least one of these sessions to discuss insurance, safety, and emergency procedures. The Coordinator may also be available to help with these sessions in other ways upon request (including covering other topics or assisting with logistics). Leaders should communicate the times and dates of pre-departure sessions to the Coordinator as soon as they are scheduled.

## 5.2: Pre-Departure Sessions and Content

Pre-departure sessions should be scheduled between 4 months and 2 weeks in advance of the program's start date. These sessions help students stay excited, get to know their course leader and the host country culture, and give the course leader an opportunity to get to know the group and respond to any student questions or concerns before arriving on site. This is an opportunity to make academic and program goals clear to participants, introduce them to some of the historical or sociocultural aspects of the destination, clarify expectations for their behavior, and answer their questions. It is also important that essential health, safety, and liability information be communicated to participants during these times. Topics that should be covered during pre-departure sessions include:

- Logistical Information:
  - Program schedule and detailed arrival information (how students will arrive at the program start location, and exact location, date, and time to arrive is essential)
  - Living conditions and accommodations
  - Any special packing instructions
  - Money (best practices, type of money to use, out-of-pocket expenses)
  - Customs and immigration information
  - Other practical information, such as time differences or wifi access
- Cultural Information:
  - Culture of the host country, social cues, dress, greetings, and special procedures
  - Laws and regulations of the destination country
- Health & Safety Information:
  - General safety and communication expectations

- Physical and mental health preparations; expectations for immunizations as required by the CDC; and program-specific health information
- Information about culture shock and homesickness
- Insurance coverage information
- Emergency contacts and protocols
- Group Expectations:
  - Group dynamics and expectations
  - Rules, behavioral expectations, disciplinary measures, and conditions for dismissal
  - Policies and information on how participants may raise complaints including, but not limited to, sexual harassment or assault
  - Procedures on dealing with alcohol and illegal drug use
  - Technology expectations
- Academic Information:
  - Academic expectations, syllabus overview, grading;
  - Initial discussions, presentations, or pre-departure assignments (if planned)
  - Introduction to course themes and orientation to the academic experience

CIEA can, upon request, help leaders design their pre-departure orientation to ensure all essential information is covered. Documentation of student attendance and verification that the above information was included in the orientation (such as a copy of pre-departure presentation or handout) must be provided to CIEA prior to departure.

## 5.2.1: Logistical Information

### 5.2.1.1: *Schedule and Arrival Information*

Participants should have a clear understanding of the schedule of the program that they are going to experience. This helps to establish clarity, avoid disappointment, and aid with proper comportment. Program Directors should be as clear as possible about the events planned and provide as many details as possible to students about the locations to be visited and the pace of academic experiences.

Additionally, Program Directors should be very precise about travel arrangements, meeting times, and location at the start of the course. Not only for convenience but for liability reasons, students should be given an exact time and location when the course will begin and end. For example, “Meet at the American Airline ticket counters at Lambert International Airport in St. Louis no later than 9AM on May 19, 2023. Program ends at baggage claim at Lambert on June 3<sup>rd</sup>, 2023 at about 2pm after flight arrives.”

When the program has group flights, CIEA will share flight information directly with the director(s) and participants as soon as flights have been purchased. Participants in programs with individual flights will be required to share flight information with CIEA no later than a month before departure.

### 5.2.1.2: *Living Conditions and Accommodations*

Program leaders should share information about living conditions and accommodations with students during pre-departure sessions. This helps to establish expectations and gives students a chance to raise any concerns in advance of the program beginning. Participants should be informed about room styles (singles, doubles, etc.) and dining considerations (kitchenette, fridge, dining services, etc.).

### *5.2.1.3: Packing checklist*

Though optional, some leaders choose to include a packing checklist for their participants. This can be especially helpful in situations where students need to bring certain items for academic assignments (such as a notebook for journaling) or to prepare for local conditions they may not otherwise anticipate (such as a spare set of glasses or a rain jacket or umbrella if rain is common in the location during the time of travel).

### *5.2.1.4: Money and finances*

Let students know about the local currency, exchange rates and best money practices. Inform them about handling money and access to banking and cash while traveling. Inform students about which activities or meals are not covered by their program fees and help them to estimate how much to budget for such expenses. If leaders have traveled to the location before or can inquire of local partners, they may also want to learn and share where the nearest banks and the ATMs are, and their hours of operation for the group.

### *5.2.1.5: Other Helpful Information*

In addition to the topics listed here, program leaders should provide information about any other logistical information that would be helpful to participants. Especially in cases where leaders intend to use technology for group instruction or communication, they should consider what technological demands are being placed on students (phones, wifi, computers, etc.) and how these demands can be met or accommodated given local conditions.

## **5.2.2: Cultural Information**

Pre-departure sessions should also cover whatever forms of cultural knowledge and types of skills students will need to thrive in the host country, including: local customs and attitudes, dress standards, and relevant laws and regulations. Most course leaders hope that student participants in their group will fully engage with the culture, the local people, and the lifestyle of the host country. However, in some cases, students who participate in short-term programs may be less experienced in overseas travel and lack confidence to explore or try new things. Instead, they may attempt to seek out people and activities that will help them feel comfortable and which seem familiar.

One way in which this can be accomplished is during the pre-departure phase of the program. Course leaders can provide students with various readings and exercises which will allow them to explore their own culture in-depth, and get them looking forward to the experience of a new culture. Here are some of the possible topics and considerations leaders might consider exploring with their group:

- Basic ideas about what “culture” is, the ways culture shapes human experience, and the ways in which cultures are different from each other; how culture shapes our values, worldview, religious beliefs, work, family, etc.
- Local customs and practices, especially ones that may be very “foreign” to students
- Food and manners around food consumption
- Social relations, styles of greeting and farewells, do’s and don’ts in this regard
- Attitudes about sex, gender, gender relations, sexuality, and dress
- Protocols around photography of people, objects, and religious settings
- How to use public transportation, maps, and local markers to get around
- Any laws students should be informed about, and the importance of following the law
- Practices around gratuities, if different from the U.S.

- What kinds of clothing to wear: casual, semi-formal; what is appropriate and or inappropriate? (for example, standards of modesty are quite different for Asian women compared to North American women - dress so as not to offend local sensibilities)
- Local weather, including a weather forecast for the period the group will be in-country

The Bureau of Consular Affairs<sup>42</sup> and CIA Factbook<sup>43</sup> are both great resources for much of this information, including country-specific information for every country in the world.

### *5.2.2.1: Dos and Dont's List*

Every society has acceptable and unacceptable behaviors articulated in social norms and mores (formalized in laws or in widely held customs or in implicit – yet assumed – manners). Educating students about these norms and customs in advance will help avoid uncomfortable situations, show respect for the culture of the people of the host country, and leave a positive feeling among the people the group interacted with for the students and faculty of Truman State University. One way this can be accomplished is with a “Dos and Don'ts” sheet, listing desirable behaviors, warning about unwanted behaviors in dress or conduct. Leaders can go over the list in a pre-departure session and review periodically in-country when a reminder is needed. Such a list could also be combined with other warnings or travel tips, what to bring, what to expect, and so on.

### 5.2.3: Health and Safety Information

Participants must also be informed about relevant health, safety, and emergency information during pre-departure sessions. This information helps to ensure that students take necessary actions before departure, have clear expectations about resources and protocol in emergencies, and prepare themselves for the stresses of short-term international travel. Pre-departure orientation is a crucial time to discuss participant safety while on the program. Let participants understand the seriousness of these discussions and the importance of having a “what if” plan of action, but avoid inducing an undue sense of fear or panic.

#### *5.2.3.1: General Safety and Communication Expectations*

Program leaders should establish and communicate a general set of guidelines for behaviors related to safety and safe practices as a group, as well as shared expectations for how the group will communicate and report to one another. Such expectations could include:

- Remind participants that one of the keys in staying safe in a foreign environment is keeping their wits about them to recognize anything that doesn't feel right and to make good decisions
- Safe practices in public, in hotels, on public transportation, or other relevant locations, such as:
  - Only taking clearly marked, official taxis
  - Not flashing expensive items: jewelry, cameras, or electronic equipment
  - Protecting one's passport and belongings, especially where pickpockets are common
  - Not accepting things from strangers and being cautious about strangers who are overly interested in you
- Risky activities to avoid or expectations around how they will be limited, such as:
  - Alcohol or drug use, traveling alone, night life, swimming, sports, etc.
  - Local traffic and street-crossing norms and watchfulness
  - Staying away from local demonstrations or civil disturbances

<sup>42</sup> <https://www.state.gov/bureaus-offices/under-secretary-for-management/bureau-of-consular-affairs/>

<sup>43</sup> <https://www.cia.gov/the-world-factbook/>

- Types of crime, illness, and emergencies that commonly occur in the host country and the appropriate preventive measures
- Expectations around being alone or meeting up with the group, such as:
  - using a buddy system, especially at night, and expectations that students will watch out for one another;
  - assigning meeting places (primary as well as secondary) for each location visited, to which students may return if they are temporarily lost
- Potential health issues students need to anticipate; provide guidance and best practices given the presence of these issues
- Enrolling in the U.S. State Department’s Smart Traveler Enrollment Program (STEP)

### *5.2.3.2: Physical and Mental Health Preparations*

During the application process, CIEA requires students to schedule appointments with healthcare professionals in order to discuss their plans for studying abroad, receive guidance on CDC recommended vaccinations and the management of any ongoing mental or physical health conditions, and complete their medical authorization form. Additionally, students are asked to complete a voluntary health disclosure form to share information about ongoing medical conditions, dietary restrictions, and allergies. This information is shared by CIEA with the program leader(s) prior to departure solely as a means of assisting leaders to better accommodate and assist students during the program, should the need arise. CIEA staff and program leaders are obliged to keep this information confidential. After the program, these records should be destroyed.

In no case should CIEA or program leader(s) ever offer medical advice to students. Instead, we share relevant information with participants and refer them to medical professionals for further consultation. Health information that should be shared includes:

- CDC health recommendations
- Instructions to receive a personal health consultation with health professionals before departure, and directing students’ questions towards these professionals
- The fact that certain prescribed U.S. medications may not be legal in other countries (for example, Adderall, a common U.S. prescription for ADD, may not be brought into Japan)
- Encouragement for students with significant on-going health problems or allergies to obtain and wear a MedicAlert bracelet or necklace. Call 1-800-ID-Alert (1-800-432-5378) or visit <http://www.medicalert.org>.
- Detailed information about the physical and mental demands of the program

If a student initiates a conversation with a leader about a medical condition and how it may impact their participation in the program, the leader is welcome to discuss it with them. However, it would be better to involve a CIEA staff member into any formal or informal conversations. If leaders do discuss the student’s condition without CIEA staff present, they should document the discussion as soon as possible thereafter and send any notes to CIEA.

### 5.2.3.3: Discussing Culture Shock and Homesickness

Culture shock, homesickness, and also reverse-culture shock are normal experiences during travel abroad, especially for those who have never travelled abroad before. One of the best ways to keep culture shock and homesickness from becoming acute abroad is to explain and normalize these experiences during pre-departure sessions. CIEA has a resource explaining the cyclical nature and typical symptoms of culture shock that can be shared with participants.

### 5.2.3.4: Insurance Coverage for Study Abroad

All students studying abroad and faculty teaching abroad are covered for the dates of the course abroad under a CISI policy that provides primary health insurance policy, emergency assistance, evacuation, and repatriation of remains. CIEA will enroll all study abroad students and leaders in this insurance within a month before departure. Participants will receive an official email from CISI ([enrollments@cisiinsurance.org](mailto:enrollments@cisiinsurance.org)) that includes a coverage brochure, insurance cards, a claim form template, and a proof of insurance letter that should be carried by participants when passing through immigration into the host country. In any situation where a student needs to use CISI insurance, they should call CISI before receiving services, wherever possible. CISI can often arrange for payment for medical services to be made directly to the provider. In other instances, the student may need to pay out of pocket, but will be reimbursed after submitting a claim.

All program leaders and participants should closely review the CISI policy (contact CIEA for the most up-to-date information) to ensure that coverage is sufficient for their own personal needs, and purchase additional insurance coverage when they require it for their own personal situation. Faculty and staff are also provided some additional coverage as employees of the University while traveling on University business.

### 5.2.3.5: Emergency Resources and Protocols

The health and wellbeing of Truman students abroad is the responsibility of the Program Director(s). Therefore, it is important to plan for scenarios that could jeopardize a program abroad, and establish a procedure for dealing with health and safety issues. Health and safety incidents can happen to anyone at any time. This *Handbook* includes emergency procedures for a number of specific situations (see Appendix B: Incident Management Procedures) that program leaders should read in advance of departure, but program leaders are also encouraged to create their own written plans specific to local conditions for their program (including nearest hospitals, partner resources, etc.). The process of creating the plan will help faculty leaders plan for incidents and responses and feel more confident of exactly how they would respond in various situations. A great resource from StudentsAbroad includes sample Emergency Action Plan Steps and how to develop a Personal Emergency Action Plan for your program. Check it out before departure, at <http://www.studentsabroad.com/handbook/emergency-planning.php?country=General>.

Leaders will also be provided with emergency cards to distribute to their students. These cards should be carried by participants at all times throughout the duration of the program. They include essential contact information for students that can be used in the event that they are separated from the group, lost, or should an emergency incapacitate the group leader(s).

## 5.2.4: Group Expectations

### 5.2.4.1: Behavior and Conduct

During the pre-departure sessions, it is important to address and clearly establish expectations around student behavior, as well as the consequences and disciplinary responses that violations will incur. Behavioral expectations help to ensure a positive experience for the students involved and make the ramifications of infractions clear. This section outlines universal expectations for Truman's faculty-led programs, areas where instructors should consider developing their own expectations, and steps for formalizing these expectations with the group.

### 5.2.4.2: Universal Expectations for Truman Students on Faculty-Led Programs

While traveling on faculty-led programs, Truman students are subject to all the same codes of conduct applicable to students while they are on campus, as detailed in the Student Conduct Code.<sup>44</sup> Additionally, on faculty-led programs, students are required to attend all classes and excursions that are part of the program itinerary. The only acceptable excuse for missing a class or an excursion is illness. Program Directors should take attendance at all classes and excursions, and are encouraged to reduce the grade of any student who is late or absent from a class or required excursion.

Participants in faculty-led programs are also expected to serve as ambassadors for both Truman and the United States. It is often difficult for students to understand what is expected of them in this regard, so it is important to stress these issues in the pre-departure orientation(s) and again upon arrival in-country. Students need to be aware that behaviors with minimal or no consequences in the U.S. may have major implications for the program. This information should be presented repeatedly to students—not just at the pre-departure orientation. Topics to be included in these discussions include:

- Appropriate dress
- Local laws and mobility (which neighborhoods in the area are safe)
- Gender dynamics and youth/elder relationships
- Food and meal etiquette
- How to recognize signs of displeasure on the part of host country nationals
- What students do in their free time
- Punctuality expectations for group activities and comportment during excursions

### 5.2.4.3: Discipline

Program Directors are responsible for addressing student behavior that disrupts the program or violates the trip's behavioral expectations. CIEA can assist Program Directors with behavioral issues, as needed. Leaders should carefully think through how they will respond to any disciplinary issues that arise, and communicate these expectations and consequences to students during pre-departure sessions. For instance, leaders may communicate their intention to address behavioral issues with students promptly and fairly, give students an opportunity to respond to concerns and to correct inappropriate behavior, and assign consequences should the concerning behavior not be corrected.

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<sup>44</sup> <https://www.truman.edu/conduct/>



Conditions that may lead to the dismissal of a student include breaking the law of the host country or lack of responsiveness to discipline following violations of program expectations. These conditions should be shared with students during the pre-departure sessions along with the conditions of dismissal, including no refunds, a failing grade for the course, and personal responsibility for expenses for their return from the program.<sup>45</sup>

#### 5.2.4.4: Creating Written Expectations

In all cases, Program Directors should codify behavior expectations and consequences in writing, though the exact form of these written expectations is left to the discretion of the leader. Written expectations are especially valuable for correcting behavior in the group during the program, whether in the form of reminders or as an explicit reference point during disciplinary proceedings. Some leaders may choose to write these expectations in advance and include them in the syllabus materials distributed to students. One advantage to this approach is that the expectations can be included in recruitment materials and on the website from an early point, so that students can read through and understand expectations even during the recruitment phase. Another approach is to create or develop a group contract in conversation with the participants during one of the pre-departure sessions. This approach can help create deeper buy-in from participants who help to establish their own expectations and develop their sense of accountability to one another and the experience. A final approach is to blend these two directions by including a general set of expectations and consequences in the syllabus, but expanding and developing those ideas with the group in the form of a group contract. Regardless of the method by which behavioral expectations are written down, in depth discussion of these expectations must be included as part of mandatory pre-departure sessions for every program.

#### 5.2.4.5: Alcohol and Drugs

The Code of Policies of the Board of Governors, section 16.030 states:

*Truman endorses the following statement of policy to prevent the use of illicit drugs and the abuse of alcohol by students and employees. "The unlawful manufacture, distribution, dispensing, possession or use of a controlled substance is prohibited on all property owned or operated by the University, herein referred to as the University campus. The manufacture, distribution, dispensing, possession, or use of intoxicating liquor is also prohibited on the University campus, except for those times, places, and purposes approved by the President of the University. The presence of persons under the influence of unlawful drugs or intoxicating liquor, regardless of where the use or consumption of such drugs or liquor may have occurred, is also prohibited on the University campus. Any employee who violates this policy will be subject to disciplinary action, up to and including termination of employment, and any student who violates this policy will be subject to disciplinary action, up to and including expulsion from the University. As a condition of their employment, due to the University's receipt of federal grants, employees of the University, both full-time and part-time, 1) must abide by the prohibition against controlled substances, and 2) must notify the University, no later than five days after their conviction, of any criminal drug statute conviction for a violation occurring on the campus."*

The spirit of this policy extends to faculty-led courses, where any housing, group flights or transportation, classroom spaces, and group meeting spaces should be treated as the University campus with regards to alcohol and controlled substances. Furthermore, local laws regarding alcohol and drugs must be strictly followed. It should be made clear to students that anyone caught using illegal substances will be immediately

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<sup>45</sup> Additional information on addressing and documenting discipline or dismissal of students can be found in section 6.1.5: Disciplining and Dismissing Students

removed from the program and sent home at their own expense. This means that if alcohol is prohibited by law at the destination (as it is in some parts of India, for instance), then it is an illegal substance for leaders and students, even if they are of legal drinking age in the U.S. Leaders should familiarize themselves with laws related to alcohol and other drug use at their destination.

Within these parameters, program leaders may set additional guidelines at their discretion, but in general it is also wise to consider the following counsel:

- Students should be educated about legally and culturally appropriate behavior regarding alcohol, as well as the consequences of inappropriate behavior. When students do consume alcohol, they should do so in a way that is in harmony with practices of the local host country. Be aware that alcohol abuse is not tolerated anywhere in the world and will not be tolerated on Truman faculty-led programs.
- Within the laws of the destination and outside of class settings, students of legal drinking age (according to the destination country's laws) should use responsible judgment at all times if they choose to consume alcohol during free time. Faculty leaders may choose to prohibit all alcohol consumption for any student on their program, or portions of their program, or during specific activities. In any case, expectations, including disciplinary consequences, should be clearly communicated to students in advance of the program and re-enforced during the program.
- Students should be explicitly discouraged from posing for or posting pictures of themselves or anyone else in the program with alcohol or drugs, which may be misconstrued and could trigger disciplinary or other legal actions. Students should also be reminded that they are expected to support one another in complying with the Student Conduct Code<sup>46</sup> and its alcohol and drug policies. Members who are in recovery or have an alcohol or drug abuse problem should be encouraged to discuss this confidentially with leaders.
- Students should be warned about the increased risks of becoming the victim of crimes or cultural misunderstandings while under the influence of alcohol, including sexual assault
- Under no circumstance should alcohol use cause a student to miss any scheduled event, become ill, cause the student to engage in behavior that might cause embarrassment to other members of the group, the course leader(s), the University, or the in-country hosts, or cause any kind of disruption to the program whatsoever.
- Responsible use of alcohol is also required on the part of all program leaders and must never interfere with their ability to fulfill their duties.
- Violation of University policy, leader guidelines, or local laws may result in discipline or dismissal from the program. Program leaders are responsible for the enforcement of these rules and disciplinary responses.

#### *5.2.4.6: Technology Expectations*

Digital communication technologies have transformed how we travel and how we communicate to our families and loved ones back home. Given the omnipresence of cell phones and email, Zoom and Facebook, leaders should think carefully about establishing expectations with students about technology during the course of the program. They may also want to consider the role technology will play in their teaching style and the potential tensions between these two facets of technology use. Here are some tips for leaders:

- Alert your students in advance if you will be traveling into a region where operating digital

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<sup>46</sup> <https://www.truman.edu/conduct/>

communication devices will be challenging or unavailable.

- Be aware that in some countries, your U.S. cell phone may not work, or you will have to add an international plan or make special arrangements to use it.
- Given how inexpensive digital photography is, snapping pictures has become a major pastime for travelers. Alert your students to host-country manners in this regard. In some cultures, being photographed is offensive; in others, it requires a respectful request. On the other hand, you can potentially incorporate student photographs into assignments and group discussion sessions. They are also useful as promotional images for future courses.
- As part of your orientation to a new city in your host-country, let students know how and how often they will be able to access their email and send messages home.
- Electric current: many countries outside of North America use different voltage or socket plugs than the United States. Students may require a converter and/or adapter for electronics.
- Most students bring cell phones with them abroad. Some will have full service, while others will keep them on “airplane mode” and take advantage of free wifi as it is available. Discuss this with your students upon arrival in order to establish a plan for quickly and efficiently locating all individuals in the case of an emergency. You may want them to download free communication apps such as “WhatsApp” or “Viber” as well as discuss a meeting place if someone gets separated from the group.

#### 5.2.4.7: Expectations for Leaders

All program leaders are expected to hold themselves to the highest ethical and professional standards and behavior when working with participants throughout the program. Leaders are also held to the same standards and codes of conduct as when they are on campus, especially as articulated in Chapter 6 of the *Board of Governors Code of Policies*<sup>47</sup> and the *Faculty Handbook*.<sup>48</sup>

### 5.3: Final Pre-Departure Materials

About one month prior to the program start date, both group leaders and participants will receive a final pre-departure email from CIEA containing essential information for the program and for emergency protocols.

Group leaders will be copied on the participant email, which will include:

- An emergency contact card with essential emergency contacts and information. There will be additional blank space on the card for the student to add in their local address and to accommodate additional information that program leaders may ask participants to add, depending on the needs for the program. Emergency contacts will include Truman contacts, local emergency and consulate services, and CISI insurance information.
- Flight information (when group flights are used)

Group leaders will also receive a separate email that includes:

- Emergency contacts for all participants in their program
- A list of emergency contacts at Truman
- Copies of immigration documents for all participants in the program
- Copies of flight itineraries and plans (when individual flights are used)

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<sup>47</sup> <https://www.truman.edu/about/our-people/board-of-governors/board-of-governors-codes-of-policies/>

<sup>48</sup> <http://facultyhandbook.truman.edu/>

- Voluntary medical disclosure information from all participants who completed one
- The *Faculty-Led Handbook* and Incident Management Procedures in Appendix B
- Expenses reconciliation form
- Grading template
- Link to final leader's report form

## PHASE SIX | LEAD

Having made all the necessary preparations, it is now time for the Program Director to lead the group through the planned program. Successful programs build on the foundation of planning established in advance, remain flexible to group dynamics and unexpected events, and make use of communication channels and emergency procedures when things go wrong. While the unexpected is certainly to be expected on faculty-led programs and disruptions are par for the course, the vast majority of faculty-led programs run without major incident and end with students and leaders who feel energized and transformed by their experiences. The following section largely assists leaders to make a plan for monitoring their group and knowing what to do if something goes wrong. It includes several simple things that are expected of all leaders in order to keep lines of communication open, as well as action plans and guidance that we hope most groups will never have to use. By knowing what kind of communication is expected and familiarizing oneself with emergency procedures prior to departure, CIEA hopes leaders can train their focus on leading their program and enjoying their experiences with students.



## Checklists for Phase Six: Lead

### For Program Leaders

- Provide initial on-site orientation(s) to introduce students to the host site, culture, and safety information (may be in conjunction with on-site program organizer).
- Contact CIEA within 24 hours of arrival to confirm all participants are safe and accounted for.
- Keep a line of communication open with CIEA (such as Whatsapp, phone, or regularly checked email) by which to receive any safety alerts and updates and by which to send immediate notifications or updates of any critical incidents (including disciplinary, health, and safety issues).
- Act as a liaison between the students and any individuals or entities providing services to the program. Ensure all onsite cooperating institutions/organizations are delivering services according to established contracts or agreements.
- Monitor the health and general welfare of all participants.
- Deliver course content in a manner consistent with planned itinerary and syllabus, while remaining flexible to organic teaching opportunities and group needs.
- Reinforce group behavioral expectations and administer discipline when needed.
- Document all critical incidents using the provided incident report form and communicate immediately with CIEA.
- Respond to any emergency situations or serious incidents which may arise using the Incident Management protocol found in the *Handbook* and notify CIEA of any incident as soon as possible.
- Spend University funds in accordance with agreed upon budgets, save all receipts, and track all expenses in an orderly fashion, using the provided reconciliation spreadsheet, which will be turned in to CIEA at the program's end.
- Never loan students program funds. Program leaders will not be reimbursed by the University for loaning money to participants.

### For Study Abroad Coordinator

- Confirm the safe arrival of all programs at their location within 24 hours of their arrival.
- Monitor all safety alerts (including the U.S. State Department, CDC, and CISI alerts) for the location of the program and promptly communicate any developing situations or issues to program leaders.
- Receive and respond to all communications and incident reports received from program leaders and coordinate any necessary collaboration or responses to problems at Truman. Monitor any ongoing situations that have been reported.
- Notify appropriate administrators in case of any emergencies that arise on the program and facilitate communication between administrators and program leaders.
- Receive and respond to communications from parents and guardians of participants.
- Generally, be available for assistance to program leaders to ensure a smooth, safe, and enjoyable experience for groups abroad.

## 6.1: Group Management

### 6.1.1: On-Site Orientation

Faculty Leaders must conduct a mandatory student orientation with students on arrival to the program country and again in each new destination. In some cases, this orientation will be completed in cooperation with a local partner or vendor. This orientation should include:

- a reminder of program and behavioral expectations
- an introduction to the local area and transportation system
- reminders of known risks and important cultural information
- an overview of program emergency plans, including the following information in written form for students to carry with them at all times:
  - phone numbers and addresses for nearest locations of local emergency services (police, Embassy/consular services, and medical facilities)
  - a safe meeting point and communication plan
  - phone number and address for the program leaders' accommodations (when not housed with the students).

### 6.1.2: On-site Safety Procedures

Program leaders should work to be aware of the general conditions within the country to which they are travelling and attempt to keep abreast of any major incidents that would cause the group concern while in-country. At the same time, CIEA will also monitor alerts and warnings from the U.S. State Department, CDC, and CISI insurance for the locations where the group is travelling and communicate these to program leaders as soon as possible. In turn, leaders should relay any applicable information to group participants and, at times, their emergency contacts. In the event of an immediate or imminent crisis that threatens the program, leaders should be in direct touch with the nearest U.S. Embassy or Consulate, contact CIEA as soon as possible, and refer to the Incident Management Procedures in Appendix B.

In such situations, Program Directors should also brief students on safe behavior, depending on the local situation and culture. This may include advising students to maintain a low profile, avoid crowds and protest groups, restaurants, and locations where Americans are known to frequent. Students should keep up with local news through newspapers, radio, and television and, in the event of disturbances or protests, not get involved. Students should be asked to use common sense and caution when divulging information to strangers about themselves, the program, and their fellow students.

### 6.1.3: Monitoring Student Health and Wellbeing

While travelling, Program Directors are responsible for monitoring the health and well-being of their students in both general and specific ways. Specifically, directors should watch for issues related to any specific health issues disclosed by a student prior to departure that can be exacerbated by stress. Generally, they should be aware of common issues that students experience while abroad. These issues include:

- **Culture Shock:** Culture shock varies by individual and by host-country and manifests in many ways; too many to mention here. Students tend to experience culture shock in ways that are similar to their general responses to stress and overwhelm. The best remedy to culture shock is educating students about it in advance and normalizing it when it occurs

- Family issues: It is not uncommon for at least one student to have a family crisis which will surface right before departure or during the study abroad period, such as storm damage to the family home, a hospitalized parent, or a family crisis. These incidents might provoke a last minute decision to cancel her/his enrollment in the course or a request to withdraw and depart early. Giving a student space to communicate with their family and talk about what is going on can often help a student resume their focus on the program
- Food and eating issues: Food can present a challenge for students who have allergies, aversions, specialized diets, idiosyncrasies, or are just not very adventurous eaters. Additionally, the group should pay attention to local advice regarding whether water is potable and which foods may lead to digestive issues. Leaders will have to find their own balance of when to push students to explore the culinary opportunities around them, and when to let students retreat to more comfortable options
- Roommate issues: Most students end up sharing rooms or staying in homestays with people who were previously strangers. Under the stress of the trip, such situations can easily lead to interpersonal conflict, if left unaddressed. Leaders will want to establish good lines of communication so that issues can be addressed and resolved

Given these common issues and the stresses of travel, maintaining good, constructive relations and open lines of communication between students and between students and Program Directors is optimal to reach course objectives. Subsequently, it is recommended that leaders take time each day to touch base with students. Ask questions, lend support, and when reasonable, use presenting issues as teachable moments. One-on-one may be more effective in eliciting honest responses to questions, and is respectful of student privacy. Leaders' knowledge of students and teaching experience will help them anticipate problems before they happen, or motivate them to intervene in a small problem before it worsens. When discussed, some of the incidents that arise on the road can serve as valuable teaching tools and cross-cultural comparisons which may lead to insightful discussions on history, culture, development, technology and economics. If any situation worsens and seems to be reaching a point of crisis, do not hesitate to contact CIEA.

#### 6.1.4: Strategies for Teaching on the Road

Teaching on the road involves both great planning and flexibility. As the Prussian general, Helmuth von Moltke the Elder once said, "No plan survives contact with the enemy." It is important that group leaders watch their groups carefully and be adaptable to what is needed most in the moment to create a great experience. A leader should trust their gut when it comes to the feeling and focus within the group. If the next thing on the schedule for the day is a museum when the group already seems "museum"-ed out, leaders should feel empowered to adjust: maybe instead students are given some needed freetime to explore and journal, or perhaps local partners can suggest an alternative option for the group. If a director wrote all the journal prompts in advance, but finds the group's interest has turned in an unanticipated direction, change the prompt or, if possible, swap out one activity for something else, to meet the group's attention where it lies. Finally, instructors should see the emotional, cultural, and group processes as equally important sources of reflection as the program's academic content. If the group starts to form cliques between students who are craving the familiar and those who are energetically jumping into everything new, leaders might consider naming what they see and encouraging students to discuss the varying reactions to cultural immersion.

#### 6.1.5: Disciplining and Dismissing Students

In section 5.2.4: Group Expectations, we discussed establishing expectations for group behavior and student comportment in written form with the group during the preparation stage prior to departure. These written and agreed to expectations create a foundation for the group, even as it arrives on location to begin the



program. At that point, group leaders then become responsible for enforcing these expectations and responding quickly any time a student behaves in a way that is clearly unacceptable, violates established or written expectations, or violates a law of the host country.

Leaders will have some discretion as to how they choose to enforce and respond to issues as they arise. However, it is important that leaders properly document both behaviors and responses in any situation where infractions are serious. Below are suggestions for both initial responses to behavioral issues and details about documenting occurrences that are more serious or that warrant consideration of dismissal.

#### *6.1.5.1: Initial Responses to Behavioral Issues*

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

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

#### *6.1.5.2: Formal Responses to Behavioral Issues and Dismissal*

Situations involving a serious infraction—whether a crime or cases in which student behavior is highly inappropriate or disruptive to the successful running of the program—need to be formally documented by the program leader using the incident report. For behavioral issues and leader responses, the incident report should include: 1) a thorough description of the initial events or inappropriate behavior, 2) any and all actions that the group leader or other responsible parties may have taken in response, 3) any sanctions or consequences imposed, and 4) the student's responses.

Depending on the nature of the circumstances, course leaders often have several options for how to respond:

1. In an isolated case of inappropriate behavior, discuss the situation with the student(s) involved as soon as possible, as well as the student(s) who might have been affected by the inappropriate behavior. The course leader should remind the student(s) of previously established and written group expectations created during pre-departure. Leaders should then confirm that student(s) involved indicate their willingness to modify their behavior going forward.

2. If a student continues to cause problems, or if the initial behavior is more serious, the course leader can consider writing or enhancing a behavior contract for the particular student that details the ramifications of continued infractions (such as being expelled from the program and receiving a failing grade in the course). In such cases, the leader should also complete an incident report and immediately notify CIEA of what has occurred. Any additional developments or infractions in such cases should likewise be documented in incident reports and updates given immediately to CIEA.

3. Because of the short-term nature of these programs, the likelihood of having to dismiss a student from a program is minimal, but when the initial violation is very serious or illegal, or if a student demonstrates a pattern of unwillingness to modify behavior despite disciplinary responses, leaders should consult with CIEA to consider dismissing the student from the program. The decision to dismiss a student from the program is both serious and difficult. Program leaders should never unilaterally dismiss a student from the program. Under such circumstances, whether or not the student has been arrested, leaders should immediately contact CIEA, who will in turn consult with the Provost, appropriate Deans, and University Counsel to advise on the best course of action. In such cases, the course leader will need to complete an incident report and provide a copy to CIEA as soon as possible.

The following behaviors are among those that may result in immediate dismissal from a program:

- Criminal activity on the part of the individual: arrest, drug use or possession, physical or sexual assault, theft, harassment, setting fires, possession of explosives or weapons, etc.
- Inappropriate behavior on the part of the individual: a continuing pattern of culturally inappropriate behavior which does not improve with advising and which endangers the program's relationship with the host institution and/or community; or behavior which is insensitive to other group members and/or damaging to the program group's morale

Dismissal of a student from any program is difficult. Please know that it is not up to the course leader alone to make this decision. Dismissing a student from the program will be done with the support of CIEA staff and University administration, who will assist in making this decision and developing a plan of action for the student's return to the United States. If it is decided that the student should be dismissed from the program, the student will receive no credit for the course, receive no refund, and be responsible for the costs and arrangements of their own return to the United States. The decision to send students home, even when made for the best reasons, may result in negative responses. In cases of arrest, Truman assumes no financial responsibility for legal aid to students. However, it is appropriate for the Program Director, with CIEA, to assist students in contacting their families and appropriate government offices.

#### 6.1.6: Voluntary Student Withdrawal In-Country

Though infrequent, there are several situations that may lead a student to request to withdraw from a faculty-led program after arriving on site, including family emergencies and homesickness. In cases where withdrawal is being considered due to an acute medical emergency with the student, instructors should follow the emergency procedure outlined in the relevant section in Appendix B. When family emergencies occur, such as a death in the family, many students will have a strong initial desire to return home, but may decide to continue the course after having the chance to speak with family and group leaders. And with regards to culture shock or homesickness, most students are able to adjust and adapt with some coaching and encouragement. Additionally, when withdrawal is requested, the Program Director should clearly articulate the financial and academic implications of withdrawal to the student.

However, there are still occasions where a student may decide to withdraw from the program despite the leader's efforts. In such cases, after the student has discussed their situation and desires with the program leader, the leader should consult with the Executive Director of International Education to determine whether a solution exists for the situation. If, after consultation, the student still plans to withdraw from the program, he or she must submit a signed and dated statement to the Program Director. This statement must indicate that the student understands that effective as of the date indicated, he or she will no longer be considered a student in the program and is therefore responsible and liable for his or her own behavior, transportation home, insurance, etc. The Program Director should send this signed and dated statement to CIEA, and the Executive Director for International Education will contact the student's designated emergency contacts to inform them of the withdrawal.

## 6.2: Emergency Response, Safety, and Liability

As the preceding sections of this document make clear, by the time a group arrives on location for a program to begin, strong foundations and expectations for the group should have already been established, starting from the moment recruitment began through all pre-departure communications and orientations. Laying this foundation of shared expectations around coursework and grading, group behavior, and health and safety is the most important thing leaders will do to ensure a smooth-running, safe, and enjoyable experience for all participants.

Emergencies remain uncommon on faculty-led programs, especially given their short-term nature, but they do occur. Preparation is key to avoiding issues and resolving them quickly and satisfactorily when they do occur. In any case where issues arise, safety and liability become chief concerns. Effective communication and documentation lead to the best resolutions and protect those involved from liability issues. The following section will guide leaders through how to navigate difficult situations that may occur while the program is abroad, keep participants safe, and avoid common liability issues.

### 6.2.1: Leadership and Liability Overview

As employees and representatives of Truman State University, program leaders have significant legal responsibility to ensure the health and safety of their entire group. In order to avoid any potential for charges of abuse, campus disciplinary action, or even civil or criminal charges, all leaders should demonstrate the highest levels of conduct and responsibility. Furthermore, the University has a fiduciary responsibility to students: students rely on the faculty, staff, and administration to provide knowledge and services in exchange for their effort (and tuition) to obtain a degree. Most lawsuits in higher education faculty-led programs are claims of negligence related to failure of professional duty (see below), or violations of contracts (e.g., in exchange for money and effort, you will receive a credit for this experience). In tort law, a duty of care is a legal obligation imposed on an individual requiring adherence to a standard of "reasonable care" while performing any acts that could foreseeably harm others. The test is the defendant's actions compared to that of a reasonable person under similar circumstances. In most cases, specialists (such as institutions sponsoring off campus study, and the faculty who represent those institutions) are held to a higher standard of care.

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

- Hiring a disreputable transportation provider, allowing the provider to stick to a schedule or route a leader knows to be unsafe, or not inspecting vehicles
- Having rules, policies, or procedures that are not followed
- Failing to conform to standard safety practices for the activity, not just the country
- Dismissing safety alerts and warnings from reputable sources, without review and documentation
- Practicing medicine without a license

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

Leading a faculty-led program involves a variety of risks, with a diverse range of legal issues that can arise from these risks. The likelihood that an individual will take legal action against the University or any of its representatives is not great enough to deter leading an overseas program, and Truman State University is committed to assisting leaders in their efforts to reduce risk and address liability issues. Nevertheless, there are a variety of actions that should be taken to reduce risk and liability. On the following pages, we have listed in significant detail types of difficult situations leaders are expected to handle should the need arise, and provide advice and key resources.

#### *6.2.1.1: Leader Conduct and Liability*

Program leaders and support staff employed by the University are covered by all the same job protections they enjoy on campus while leading off campus. At the same time, they are also subject to the same codes of conduct and policies governing their behavior and professionalism off campus during their programs as they have while teaching on campus. Program leaders and support staff who violate applicable laws in the U.S. or host country or Truman State policies will be subject to removal from the program, including while in travel status. CIEA will defer to the University to respond in accordance with Truman State policy. In any situation, CIEA will strive to maintain the integrity of the program as planned.

#### *6.2.2: Responsibilities and Reporting*

Program leaders are responsible for managing the general safety of the group. Additionally, any time an emergency or incident occurs, the program leader is also responsible for taking immediate on-the-ground actions to preserve the integrity and safety of the group and its participants, communicating with CIEA, and documenting the incident as it unfolds.

Though actions taken to preserve the integrity and safety of the group and its participants should always take precedence, all incidents or emergencies should be documented as completely as possible and as soon as possible as or after they occur. Qualifying events include all concerning events or allegations related to student discipline, health, or safety. These events must be documented due to their potential bearing on liability issues. Additionally, program leaders are mandatory reporters of all incidents which fall under Title IX (see sections 6.2.2.1). If the course leader was not at the scene of the incident, it is essential for them to speak to as many witnesses as possible to obtain a clear sense of what happened. If the local police intervene, the course leader must attempt to obtain a copy of the police report. CIEA should be provided with documentation as soon as possible and within 24 hours of any incident. In documenting an incident, Program Directors should use the Study Abroad Participant Incident Form. If access to this form is not available, group directors should make note of the following:

- Date and time of incident
- Location of incident
- Names of all students involved
- Names of all others present
- How and when you learned of the incident if you were not present
- Brief description of the incident
- Brief description of your response to the incident
- Names and contact information of any physicians, officials, or police involved
- If a student was injured or ill and received medical attention, a description of the treatment and any recommended aftercare, including the names of medication
- If a student was incapable of making decisions (about medical treatment, for instance), explain who made those decisions
- Notes regarding contact with students' parents and any Truman offices

#### 6.2.2.1: Title IX

The program leader(s) for faculty-led programs are mandatory reporters for Title IX compliance at Truman State University. All faculty and students, as per Truman policy, are to adhere to the Title IX Policy whether at Truman or leading an off campus program. Title IX and its implementing regulation, at 34 C.F.R. § 106.31 (a), provide that no person shall on the basis of sex, be excluded from participation in, be denied the benefits of, or be subjected to discrimination under any academic, extracurricular, research, occupational training, or other education program or activity operated by the University. Sexual harassment is a form of sex discrimination prohibited by Title IX. Sexual harassment is unwelcome conduct of a sexual nature. Sexual harassment can include unwelcome sexual advances, requests for sexual favors, and other verbal, nonverbal, or physical conduct of a sexual nature, including rape, sexual assault, sexual battery and sexual coercion, or other sexual misconduct.

Sexual harassment of a student can deny or limit, on the basis of sex, the student's ability to participate in or to receive benefits, services, or opportunities in the school's program. Any student, faculty or staff member with questions or concerns about sex discrimination or sexual harassment, or who believes that he or she has been the victim of sex discrimination or sexual harassment may contact the Title IX Coordinator for assistance by email to [titleix@truman.edu](mailto:titleix@truman.edu), by telephone (660) 785-4354, or through the online Report a Complaint form.<sup>49</sup> The Title IX Officer is available to discuss options, explain University policies and procedures, and provide education on relevant issues. Off-campus study program leaders have reporting responsibilities under the law and are mandated reporters of sexual misconduct or harassment.

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<sup>49</sup> <https://titleix.truman.edu/make-a-report/>

## 6.2.3: Responding to Emergencies: Incident Management Procedures

### 6.2.3.1: Definition of an Emergency

For study abroad purposes, an emergency is any circumstance that poses a genuine risk to, or that has already disturbed the safety and well-being of the program participants. An emergency may entail:

- Death of a participant or course leader
- Serious injury or illness (physical or mental) that can be defined as one requiring hospitalization, or one that makes it impossible for the participant or course leader to continue the program
- Emotional or psychological condition requiring removal from the situation or professional intervention
- Being the victim of a serious crime (robbery, assault, kidnapping, rape, etc.)
- Being accused of committing a crime, arrested or detained, or questioned by police or other security forces; or any legal action involving a participant or leader
- A missing or disappeared participant or leader
- A situation — either in the U.S. or at a program site — that arises which causes serious concern (i.e., a political uprising or a natural disaster, an act or threat of war or terrorism, or other event causing or threatening harm to participants or course leader)
- Sudden evacuation of a participant or course leader in response to a stateside emergency
- Travel Warning issued by the U.S. State Department specific to a country, region, or world-wide

### 6.2.3.2: Emergency Resources and Communication

In the event of any emergency, leaders should contact CIEA as soon as possible, or the University Police when CIEA cannot be reached. CIEA is responsible for coordinating the University's response to all crises taking place within faculty-led programs, and we are here to assist and accompany leaders through any challenges they face while abroad. When leaders are unsure whether a situation constitutes an emergency, they should contact CIEA and err on the side of being overly cautious. This helps CIEA stay in the loop, offer guidance and assistance regarding issues that may have liability consequences, and be prepared and knowledgeable about situations, should they be contacted by a student's parents (which happens frequently, as many students are inclined to contact their home even when minor issues occur). Regardless of what happens during the program, CIEA is here to work to ensure the continuity of the program, wherever possible, or to aid in evacuating students as quickly and judiciously as possible when it becomes necessary.

In addition to CIEA, leaders have a number of resources at their disposal, depending on the nature of the emergency:

- CISI Insurance: Call in the event of any medical event to arrange for payment for care; can also help provide guidance and logistics for evacuating a country
- Local partners: Often a great resource for identifying and working with local resources, hospitals, police, etc.; also a great source of local information and safety advice
- Local police and medical professionals: First responders when a student has become sick or injured or when a crime has occurred, a source of advice and guidance regarding safety and local events
- U.S. State Department (Embassy or Consulate): A resource and source of information in the face of local, regional, or national crises; also a contact point when a crime has been committed or a participant faces legal issues

### *6.2.3.3: General Guidelines for Responding to an Emergency*

Any emergency or incident, whether real or perceived, requires a response from the University. Although no plan will apply to every situation, a common set of factors must be examined in every case.

In an emergency situation, students count on program leaders as their main source of information and help. Dealing with the incident must take priority over other duties. In an emergency, the Program Director's first responsibility is to safeguard the safety and wellbeing of the program participants. The Program Director should do whatever is necessary to ensure this, whether this means obtaining prompt and appropriate medical attention, U.S. Embassy intervention, or police protection. However, the program leader should not attempt to handle all aspects of the emergency him or herself. The leader should stay calm, focused and never say more than necessary to program participants or external parties. CIEA will provide support, following established emergency procedures that may involve an extended network of resources on and off campus, to help course leaders and participants deal with crises. In the event of an emergency, program leaders need to make every attempt to contact CIEA as soon as possible, using established communication methods or the University Police line. Program leaders can reach a CIEA staff member through the University Police 24-hours a day, seven days a week at 660-665-5621. University Police have contact information for all CIEA staff and other appropriate administrators on campus.

Please note that if an emergency situation develops, it is likely that program participants will be very anxious about the situation and possibly their own safety. It is important to discuss these anxieties with the students and ensure a direct line of communication with CIEA. Lack of communication could cause parents of students to become frantic and contact the University. As the University representative, group leaders play a primary role in de-escalating a situation. Group leaders will be responsible for communicating directives from CIEA and University administration to the students. It may be necessary to or debrief program participants after the emergency occurs. Confidentiality must be respected, but in emergency situations, course leaders should act in good faith and use their best judgment.

### *6.2.3.4: Heightened Risk Conditions*

Sometimes more general risks may arise while the group is in country, such as a terrorist threat, protests, or a heightened political environment. In such cases, program leaders should consult appropriate Embassy or Consulate resources on a regular basis about the evolving situation and determine how program participants should respond. In any other sort of emergency, the Program Director should notify the local police about the situation—if they and the Embassy feel it is appropriate—and then follow the procedures the police may require of them and/or the student.

During a political crisis or some other emergency, during which foreigners in general or U.S. citizens in particular may be at risk, students should be told to keep a low profile. They should avoid demonstrations, behavior that could call attention to themselves, places where Americans are known to congregate, and using luggage tags and wearing clothing which identifies them as Americans.

It is highly unlikely that participants will need to be evacuated from a site abroad. In many situations, it is much safer to lie low than to draw attention to the group through an evacuation process. CIEA will, however, bring students and program leaders home if a situation were to deteriorate to the point where the degree of potential risk to participants was deemed unacceptable. If this unlikely event were to happen, the Executive Director of International Education, in consultation with the insurance company, Program Director, the U.S. Embassy and State Department, and the Truman Study Abroad Incident Management Team, would develop an evacuation plan in as much detail as possible. The plan would be transmitted to the Program Director in

confidence, and administrators at Truman would work closely with the Program Director throughout the evacuation process.

#### 6.2.3.5: Guidelines for Emergency Communication

In general, Program Directors should follow these guidelines when communicating with the students during an emergency situations:

- **Share information:** Give students as much, and as accurate, information as possible. Document the situation and communicate with CIEA on an ongoing basis
- **Assess the situation:** How long will it last? Is it an inconvenience or a threat?
- **Keep calm, and keep others calm:** Do not panic. Discourage students from gossiping and thus escalating the situation. Urge caution regarding sending panicked emails to parents or guardians

In a serious emergency, the Truman Study Abroad Incident Management Team will determine whether the program will continue and possible evacuation procedures.

Certain situations may put leaders in the role of de facto spokesperson. Never release the name of students or speak on Truman State's behalf without contacting the Executive Director of International Education, or designate, to provide support and assistance in developing responses to media inquiries. If contacted by the media during an emergency or incident and the leader has NOT been in contact with CIEA, please use the following statement: *My first responsibility is to the students on this program, to their families, and to the University. I will be happy to discuss this matter with you after I have contacted these parties. Thank you for your understanding.*

#### 6.2.3.6: Responsibilities to Individuals and the Group

When an emergency happens for a single student or small subset of the group, it can be challenging for a single leader to balance the needs of the individual student and the group. In such situations, there are several important things to keep in mind. Please remember that students may not be left alone in a hospital without a designated person remaining with the student (including overnight). If leaders find themselves in this situation, they should contact CIEA immediately. We will help them to figure out how to ensure the hospitalized student's safety, while also continuing with the planned program activities. Solutions might include involving a local partner or a second student to stay at the hospital, finding personnel support through Study Abroad connections in-country, or reorganizing the planned itinerary if needed.

#### 6.2.3.7: CIEA Response to Emergencies

When contacted concerning a serious injury, death, or emergency, CIEA will:

- Begin a log of all calls and activities pertaining to the incident, to include date and time of calls or actions
- Gather the following information:
  - Name, location, and contact of caller (address, city, country, phone/fax number, email)
  - Time and date of call
  - Individuals involved in the situation
  - Time and date of situation
  - Brief description of situation



- Location of accident or emergency; proximity to Truman students
- Phone and fax number where caller can be reached
- Verify that calls have been placed to emergency response services and/or U.S. Embassy/Consulate, if the situation warrants
- Inquire about information, if any, that has been released to the media
- If appropriate, instruct the caller to call again after the emergency response team and/or law enforcement have arrived at the site of the incident
- Proceed with appropriate steps as needed, such as:
  - Contact and bring together members of the Study Abroad Incident Management Team
  - Contact local authorities as relevant (e.g. on-site program partner, police, U.S. Embassy/Consulate) to request assistance
  - Contact parents of student or the family of faculty member to apprise them of the situation
  - Determine if funds are needed to cover emergency expenses, if necessary
  - Consult with University legal counsel as appropriate

#### *6.2.3.8: Incident Management Team*

After notification of emergency situations, the Executive Director of International Education may convene the Study Abroad Incident Management Team to ensure an effective University response to the situation. This group will have authority to manage and direct the handling of the University's response to any unfolding faculty-led program incident, including providing direction to a specific program leader. This work may involve some of the following action steps:

- Receive, coordinate and assess information on perceived threats to the safety and security of University students, faculty, staff, visitors or property
- Share and evaluate available information to determine if an articulable and significant risk of threat is present
- Develop an appropriate plan of action to mitigate the risk, including intervention strategies to deal with violence, threats and disruptive behavior
- Respond to situations involving a risk of violence or threatening behavior, including behavior indicating a potential risk of harm to self or others
- Identify and develop resources for troubled faculty, staff, and students
- Make referrals to the Students of Concern Committee or other appropriate campus offices
- Communicate with others as necessary and appropriate to carry out the team's purposes
- Recommend University action regarding campus safety and security matters to appropriate decision makers
- Review and assess outcomes of actions taken

The Study Abroad Incident Management Team will consist of the following members and such other members as the Executive Director of International Education may deem appropriate in specific cases:

- Executive Director of International Education
- University Legal Counsel
- Dean of Student Life
- Director, Public Safety
- Comptroller

### 6.2.3.9: Emergency Action Plans for Specific Situations

Different types of crises may surface while the group is on the road. They come in many forms, from individual students dealing with physical or emotional/mental health problems, to in-country crises of a political or environmental nature, to leaders and/or students victimized by criminal acts. The Incident Management Procedures describe the procedures for dealing with emergencies and are included in both the leader's pre-departure email and Appendix B of this *Handbook*. Leaders should read these before departure in order to prepare students for these procedures. If an emergency arises, leaders need to be ready to act in a manner that protects students and properly executes their responsibilities as an official agent of Truman State University. Maintaining the safety of students is the leader's highest priority in the face of an emergency. From the moment an emergency arises, program leaders should be prepared to be on-call 24 hours a day and in regular communication with CIEA until the emergency is resolved. Beyond the general guidelines offered above, Appendix B offers travel leaders specific guidance in handling emergency situations that may arise in the course of a program.

## 6.3: Budget Management Abroad

In their role as on-site financial manager, program leaders will manage budgeted funds, keep financial records, and make payments that haven't already been pre-paid. All of the program funds are State of Missouri funds, and day-to-day expenditures must be clearly documented. This task requires some organization, and the Coordinator will provide leaders with a method for tracking their receipts and expenses.

When leaders return to Truman after the program, CIEA will collect their receipts and itemizations. It is a State of Missouri policy that an itemized paid receipt is required as verification for how State funds are used. Always request an itemized receipt. If for some reason the vendor is unable to provide an itemized receipt, leaders should write their own itemized receipt at the time of purchase, and ask the vendor to sign it.

Program budgets are designed to offer leaders sufficient flexibility so that the unexpected group meal or additional transportation cost will not be a problem. But, as the financial manager, leaders will need to work closely with the Coordinator to thoroughly understand their program budget, what amount of money they can spend on the ground, and how to record their expenses. Be conscientious about this. Leaders may find it an unwelcome clerical task, given their other teaching and travel responsibilities, but the trust and confidence that Truman places in leaders to lead a faculty-led program comes with such fiduciary accountability.

## PHASE SEVEN | REVIEW

The process of leading a faculty-led program does not end on the last day of travel. As students and leaders return home, there will be continued integration of the experience, some concluding exercises and paperwork to complete, and space for everyone involved to reflect, review, celebrate, and leave helpful insights and information for future marketing and renewals of the course. While often an overlooked step in the process, this can be one of the most fruitful moments to discover how to make a great program even better.



## Checklists for Phase Seven: Review

### For Program Leaders

- Host a final post-program debriefing session for your group (if planned)
- Establish or keep post-program lines of communication open with your group
- Invite your group to share their experiences through media, presentations, or recruiting activities.
- Administer any required departmental course evaluations (if required by department)
- Complete grades and submit to CIEA within two weeks of the final date of your program (using provided form)
- Submit your expenses reconciliation worksheet to the study abroad Coordinator within two weeks of return (using provided form)
- Submit the leader's program report form to the Coordinator within two weeks of return (using provided form)
- Participate in an in-person debriefing session with the Coordinator within 30 days of return
- Complete expense reconciliation forms provided by CIEA for all program purchases and return to the Coordinator with all expense receipts

### For Study Abroad Coordinator

- Provide assistance to program leaders and/or students with post-program sharing and recruiting activities.
- Provide student participants with faculty-led program evaluation forms, then collect and process results and share with relevant stakeholders
- Review all received forms from leaders and share with relevant campus units
- Construct a final financial report for the program after reconciliation has been received
- Schedule and lead an in-person debriefing session with program leaders within 30 days of return
- Complete a Coordinator's report on the program within 60 days of the program's return
- Complete a final expenses budget with the Business Office after the program is completed and all payments have been recorded and reconciled

## 7.1: Student Re-Entry and Integration

In addition to the culture shock of going abroad, many students experience a reverse culture shock upon their return to the United States, even after a short-term program. In addition to mental, emotional, and cultural adjustments, there can also be a struggle to integrate academic learning and to find channels for their enthusiasm and excitement. One of the final tasks of the group leader is to assist students through this re-entry process. While this can be challenging, because the group is no longer gathered in the same way as during the program, below are several suggestions for helping students through this adjustment.

### 7.1.1: Post-Program Debriefing

Academic literature on short-term programs highly recommends convening students one final time, between a week and a month after the program has concluded, to debrief students on their experience and check in with how they are adjusting and integrating back to the United States. Since many of Truman's programs end during the middle of the summer, it may be easier to conduct such debriefing sessions over a video chat service like Zoom rather than gathering in person. Students continue to learn from their experience as they work to integrate their experiences abroad with their return home, and a debriefing session can serve as a check in for how the learning process has continued for students. At the same time, a post-program debriefing is also an opportunity to check in with students' emotional and mental adjustments in the face of reverse culture shock. Simply having a moment with the group to share feelings such as frustration or excitement can help students to normalize their experiences upon return. We recommend that debriefing sessions be planned in advance and noted on the syllabus.

### 7.1.2: Post-Program Communication

In addition to a post-program debriefing, or in situations where a group debriefing is not possible, leaders may consider ways to open up or continue existing lines of communication among the group in the post-program period, whether through a Facebook or Groupme group or through an email chain, etc. Leader participation in such communication channels can encourage additional debriefing and sharing opportunities for the group.

### 7.1.3: Post-Program Presentations and Promotion

A final way to assist students in their re-entry is by inviting or requiring various forms of presentation or assistance with promotion of the program for subsequent years. Such presentations and promotional help serve a dual purpose. Not only is the testimony of previous students a powerful recruitment tool for future participants, but it also provides a channel for past participants to integrate and present what they have learned and share their excitement about their experience with people who are interested. Presentations may take the form of videos, pictures, or media shared with CIEA or talks to classes, groups, or at department events. In the past, some programs have hosted presentation nights open to the wider campus community where students talk about their experiences. These kinds of events help to create a culture within departments that ensures high interest in programs year after year. Furthermore, when students share in these ways, it enhances the entire Truman community and promotes the value of studying abroad and studying away more generally. The Coordinator is available to work with students and leaders to support such presentations and events or to aid in collecting and sharing media and materials produced by students.

## 7.2: Final Documentation and Program Wrap-Up

In addition to assisting with the return and reintegration process for students, the final post-program task for leaders is the submission of several important documents to CIEA and a program debriefing with the Coordinator.

### 7.2.1: Department Evaluations & Faculty-Led Program Evaluations

At the conclusion of the program, two evaluations need to be collected from students. First are the regular course evaluations that departments collect on all courses at Truman. These department evaluations are the responsibility of the faculty leader to coordinate and collect, in compliance with the requirements of their department and school. Second are special faculty-led program evaluations that ask more generally about the logistical and administrative aspects of the program experience. These program evaluations are the responsibility of CIEA. They will be sent to students directly by CIEA within a week of the end of the program. After grades have been submitted, CIEA will share the results of these evaluations with the program leaders, the relevant department chair and dean, and the faculty-led programs review panel to help guide conversations about program improvement.

### 7.2.2: Grades

Unlike regular term grading, leaders should submit course grades for faculty-led study abroad to the Coordinator, using a template grading spreadsheet that will be distributed to the Program Director(s) with instructions before the program's departure. Program Directors are required to submit the course grades within two weeks of the final day of the program to the Coordinator. Any alternative grading arrangements must be discussed with the Coordinator in advance. Student grades will be held by CIEA until students have completed the required faculty-led program evaluations (more below), after which they will be passed to the registrar to be recorded, typically within a month of being received.

### 7.2.3: Reconciliation of Program Expenses

Program funds are funds of the State of Missouri under the stewardship of Truman State. Program leaders are entrusted with their use for explicitly stated program uses. Therefore, CIEA takes seriously the collection of a comprehensive financial reporting for all expenses incurred by leaders of the program. Prior to the program's departure, the Coordinator will distribute a template reconciliation spreadsheet to the program leader(s), with instructions on how to record all expenses (whether charged to a P-Card or submitted for reimbursement). Program leaders should follow these directions carefully, including the recommendation to track program expenses as they occur during the program and carefully collect and save all receipts associated with expenses. Submission of a final reconciliation of program expenses on the provided spreadsheet, along with all receipts for expenses incurred, is due to CIEA within two weeks of the final day of the program.

### 7.2.4: Final Leader Report and Debriefing

Following the conclusion of the program, all program leaders are asked to reflect on and evaluate their programs and to complete a leader report form provided by CIEA within two weeks of the final date of the program. The report invites leaders to reflect on such topics as academic components, group dynamics, itinerary or logistical issues, etc. These program leader reports are critical to the program process, as insights,

suggestions and lessons learned are incorporated into planning for future programs. These reports also help CIEA to better prepare and train future program leaders.

Once the program report has been received, the Coordinator will arrange an in-person meeting with the program leader(s) within 30 days of the program's conclusion in order to:

- Debrief the program
- Discuss the Program Director report
- Review a final budget developed from final expense reports
- Analyze student evaluations and discuss any lessons or modifications for future program iterations based on these evaluations

The debriefing is a time for thinking through the program, but also a time to celebrate the work and rewards of everything leaders have done. Hopefully, there were no serious illnesses or emergencies, the itinerary worked well enough, and the group all made it home safe and sound! Faculty-led programs are transformative experiences for both students and leaders, and we want to share that joy with leaders and hope we will already be talking about how to keep the program going with a new group of student travelers!

## Appendix A: Assumption of Liability and Release Waiver

**TRUMAN STATE UNIVERSITY  
ASSUMPTION OF RISK AND RELEASE FORM  
STUDY ABROAD OR STUDY AWAY PROGRAM**

**Name of participant** \_\_\_\_\_

**Date of birth** \_\_\_\_\_  
(If participant is under age 18, a parent or legal guardian must also read and sign this form)

**STUDY ABROAD OR STUDY AWAY PROGRAM:** Truman State University (Truman) is offering a Study Abroad or Study Away Program (Program) to allow students to pursue their academic interests outside the Truman campus. This Program naturally includes a travel component. This travel component will take place within the United States and it normally includes international travel as well. It is my desire to study and travel as a participant in the Truman Study Abroad or Study Away Program.

**RISKS OF STUDY ABROAD OR STUDY AWAY:** I understand that participation in the Program as well as the travel associated with the Program involves risks to my health and wellbeing that are beyond the control of Truman. On the other hand, participation in this Program provides an opportunity for academic achievement and personal growth that I could not otherwise attain so I want to participate in spite of the risks involved.

I understand that my course of study may expose me to some or all of the following conditions:

- dangers associated with travel by air, bus and automobiles and trucks,
- dangers associated with hiking, and general physical activity in a variety of locations,
- exposure to disease and infections, food and drinking water borne illness as well as dangerous and poisonous insects and animals,
- foreign political, legal, social and economic conditions,
- different standards of design, safety and maintenance of buildings, public places and conveyances, local medical and weather conditions, and
- other matters as outlined by the Department of State, Consular Information Sheets and Travel Warnings

I have made my own investigation and am willing to accept these risks. I realize that Truman cannot always protect me from these and other risks or eliminate these and other risks from the Program. I know that I must be responsible for my own decisions and take appropriate precautions on a day to day basis while participating in this course. I agree to follow the directives of Truman faculty and staff who may be



supervising this Program. At such times as I am engaged in activities of my own apart from the group or in departure from the group plan, I am solely responsible for my own safety and wellbeing.

**MEDICAL:** I have planned ahead to manage any medical conditions I may have, understanding that medical care will not always be available and that the standard of medical care may be different in foreign countries. I understand that Truman does not carry accident or medical insurance for my benefit. I will purchase the available health and emergency insurance and will familiarize myself with the benefits provided by such coverage and I understand that I will be responsible for any costs incurred but not covered by the insurance. There are no health related reasons or problems which preclude me from participation in this Program. I agree to promptly express any health or safety issues or concerns to the Program faculty or staff or other appropriate persons. If I have a disability for which I will request accommodation, I will so notify representatives of the Program sufficiently in advance to allow a reasonable time in which to consider the request and respond to it.

**STANDARDS OF CONDUCT:** I understand that each foreign country has its own laws and standards of acceptable conduct, including dress, manners, morals, politics, and drug and alcohol use. I understand that behavior which violates those laws or standards could harm Truman's relations with those countries and the institutions there as well as my own health and safety. I will become informed of and will abide by such laws and standards for each country to or through which I will travel during the Program. I will also comply with Truman's rules, standards and instructions for student behavior. I will attend to any legal problems I encounter with any foreign nationals or government of the host country. Truman is not responsible for providing any assistance under such circumstances.

**TRAVEL AND PROGRAM CHANGES:** Truman has the right to make cancellations, substitutions or changes in case of emergency or changed conditions or in the interest of the Program. Truman's Program activities do not include charges for transportation unless otherwise stated. At such times as transportation is included as part of the Program cost, I understand that Truman's fees and program costs are based on current airfares, lodging rates and travel costs, which are subject to change. If I leave or am terminated from the Program for any reason, there will be no refund of fees already paid and I may receive a failing grade for the course. I accept all responsibility for loss or additional expenses due to delays or other changes in the means of transportation, other services, sickness, weather, strikes or other unforeseen causes. If I become detached from the Program group, fail to meet a departure deadline by bus, airplane or train or become sick or injured, I will, at my own expense, seek out, contact and rejoin the Program group at its next available destination.

Visa applications and visa management are my responsibility and I recognize that visa regulations are subject to change on short notice and that such regulations and changes are beyond the control of Truman.

**ASSUMPTION OF THE RISKS AND RELEASE OF CLAIMS:** Knowing the risks described above, and in consideration of being permitted to participate in this Program, I agree, for myself and on behalf of my family, heirs and personal representative, to assume all the risks and responsibilities surrounding my participation in the Program. I hereby agree to release, hold harmless and indemnify the Board of Governors of Truman State University, its individual members, its officers, employees and agents, from and against any present or future claim, loss or liability for injury to person or property which I may suffer, or for which I may be liable to any other person, during my participation in the Program including the period in transit to or from any location where the Program is being conducted.

I have carefully read this form before signing it. No representations, statements or inducements, either oral or written, apart from the foregoing written statement, have been made. This agreement will be governed by the laws of the State of Missouri, which shall be the forum for any lawsuits filed under or incident to this agreement or to the Program.

\_\_\_\_\_  
**Signature of participant**

\_\_\_\_\_  
**date**

I am the parent or legal guardian of the above named participant in Truman's Study Abroad Program and have read the foregoing Release form and I agree to be legally responsible for the obligations and acts of the student/participant as described above, and agree for myself and on behalf of the participant to be bound by its terms.

\_\_\_\_\_  
**Signature of parent/guardian**

\_\_\_\_\_  
**date**

## Appendix B: Incident Management Procedures

### Serious Illness or Injury of Student or Group Leader

1. **Begin a chain of local action:** Seek immediate medical care and contact the local authorities in the host country. This could be the police, medical professionals, U.S. Embassy officials, or others as appropriate. The most convenient and reliable source of medical care should be used; CISI does not have a network of preferred providers. Begin documenting everything that occurs as soon as possible.
2. **Inform the insurance company:** If the student/course leader is unable to do this him/herself, obtain their CISI card and call 1-800-303-8120. CISI must be notified as soon as possible in order to manage the medical costs.
3. **Communicate a plan with the group:** Assure the group's safety, make and communicate immediate plans and expectations regarding the group's response. Clearly define any specific roles needed in the group.
4. **Contact Truman:** Contact CIEA using established communication methods or via the University Police (+1 (660) 665-5621). CIEA will then notify the appropriate Truman administrators and officials, based on the needs of the situation. At that time, a decision will be made regarding the notification of student emergency contacts.
5. **Encourage** student participants/course leader to get in touch with their emergency contact(s).
6. **Talk to all program participants** to see how they are feeling. Answer questions, provide information, and offer encouragement.
7. **Complete an incident report** detailing what has occurred.
8. **Keep CIEA informed** and updated of all actions taken, using established communication methods.

**\*\*If the injury was derived from sexual assault, the incident must be reported to the Title IX Officer (+1 (660) 785-4354).**

### Student or Course Leader with Emotional/Psychological Distress

1. **Begin a chain of local action:** Seek immediate medical care and contact the local authorities in the host country. This could be the police, medical professionals, U.S. Embassy officials, or others as appropriate. The most convenient and reliable source of medical care should be used; CISI does not have a network of preferred providers. Begin documenting everything that occurs as soon as possible. Do not leave the student or course leader alone.
2. **Inform the insurance company:** If the student/course leader is unable to do this him/herself, obtain their CISI card and call 1-800-303-8120. CISI must be notified as soon as possible in order to manage the medical costs. CISI can arrange an appointment with counseling services located near the student/course leader.
3. **Communicate a plan with the group:** Assure the group's safety, make and communicate immediate plans and expectations regarding the group's response. Clearly define any specific roles needed in the group.
4. **Contact Truman:** Contact CIEA using established communication methods or via the University Police (+1 (660) 665-5621). CIEA will then notify the appropriate Truman administrators and officials, including the Dean of Students and University Counseling Services. At that time, a decision will be made regarding the notification of student emergency contacts.
5. **Encourage** student participants/course leader to get in touch with their emergency contact(s).
6. **Talk to all program participants** to see how they are feeling. Answer questions, provide information, and offer encouragement.

7. **Complete an incident report** detailing what has occurred.
8. **Keep CIEA informed** and updated of all actions taken, using established communication methods.

**\*\*If the emotional/psychological distress was derived from sexual assault, the incident must be reported to the Title IX Officer (+1 (660) 785-4354).**

### Transportation Accident

1. **Account for everyone in the group.** Make sure everyone in the group is present and identify any injuries.
2. **Begin a chain of local action:** If local police are not on the scene, notify them immediately using the local 911 equivalent. Direct any emergency personnel to any injured participants. Begin documenting everything that occurs as soon as possible.
3. **Communicate a plan with the group:** Assure the group's safety, make and communicate immediate plans and expectations regarding the group's response. Clearly define any specific roles needed in the group.
4. **Contact Truman:** Contact CIEA using established communication methods or via the University Police (+1 (660) 665-5621). CIEA will then notify the appropriate Truman administrators and officials, as appropriate. At that time, a decision will be made regarding the notification of student emergency contacts.
5. **Encourage** student participants/course leader to get in touch with their emergency contact(s).
6. **Talk to all program participants** to see how they are feeling. Answer questions, provide information, and offer encouragement.
7. **Complete an incident report** detailing what has occurred.
8. **Keep CIEA informed** and updated of all actions taken, using established communication methods.

### Student or Course Leader Becomes a Victim of a Crime (Robbery, Mugging, Assault, etc.)

1. **Secure the safety of the victim.**
2. **Begin a chain of local action:** Seek immediate medical care if necessary or contact the local police using the local 911 equivalent. The most convenient and reliable source of medical care should be used; CISI does not have a network of preferred providers. Begin documenting everything that occurs as soon as possible. Always have one other person present when discussions related to events in this category takes place. It is vital to do so, as an observer can keep track of details and arrangements during an emergency situation.
3. **Inform the insurance company:** If the student/course leader is unable to do this him/herself, obtain their CISI card and call 1-800-303-8120. CISI must be notified as soon as possible in order to manage the medical costs. CISI can arrange an appointment with counseling services located near the student/course leader.
4. **Communicate a plan with the group:** Assure the group's safety, make and communicate immediate plans and expectations regarding the group's response. Clearly define any specific roles needed in the group.
5. **Contact Truman:** Contact CIEA using established communication methods or via the University Police (+1 (660) 665-5621). CIEA will then notify the appropriate Truman administrators and officials, based on the needs of the situation. At that time, a decision will be made regarding the notification of student emergency contacts.
6. **Encourage** student participants/course leader to get in touch with their emergency contact(s).
7. **Talk to all program participants** to see how they are feeling. Answer questions, provide information,

and offer encouragement.

8. **Complete an incident report** detailing what has occurred.
9. **Keep CIEA informed** and updated of all actions taken, using established communication methods.

**\*If the crime involves sexual assault or gender-based crime, the crime must be reported to the Title IX Officer (+1 (660) 785-4354).**

**If the situation has occurred between Truman students**, CIEA will pass the report on to Student Affairs who will then act upon the situation.

**If the situation occurs between a Truman student and course leader**, CIEA will pass the report on to both Student Affairs and the Office of the Provost and VPAA who will then act upon the situation.

**If the situation is between a Truman student and an outside party**, actions will depend upon the laws of the host country and desires of the victim. Also, CIEA will contact Truman Legal Counsel and Student Affairs for advice.

#### Student or Course Leader Accused of Committing a Crime or Arrested

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

1. **Begin a chain of local action:** Contact the local authorities in the host country. This could be the police, medical professionals, U.S. Embassy officials, or others as appropriate. Begin documenting everything that occurs as soon as possible.
2. **Inform the insurance company:** If the student/course leader is unable to do this him/herself, obtain their CISI card and call 1-800-303-8120. CISI must be notified as soon as possible in order to manage the medical costs.
3. **Communicate a plan with the group:** Assure the group's safety, make and communicate immediate plans and expectations regarding the group's response. Clearly define any specific roles needed in the group.
4. **Contact Truman:** Contact CIEA using established communication methods or via the University Police (+1 (660) 665-5621). CIEA will then notify the appropriate Truman administrators and officials, based on the needs of the situation. At that time, a decision will be made regarding the notification of student emergency contacts.
5. **Encourage** student participants/course leader to get in touch with their emergency contact(s).
6. **Talk to all program participants** to see how they are feeling. Answer questions, provide information, and offer encouragement.
7. **Complete an incident report** detailing what has occurred.
8. **Keep CIEA informed** and updated of all actions taken, using established communication methods.

**\*\*If the crime involves sexual assault or gender-based crime, the crime must be reported to the Title IX Officer (+1 (660) 785-4354).**

**If the situation is between a Truman student and an outside party**, actions will depend upon the laws of the host country and desires of the victim. CIEA will contact Truman legal counsel and Student Affairs for advice.

## Missing Person

1. **Assure the safety** of other group participants.
2. **Begin a chain of local action:** Contact the local authorities in the host country, if needed. This could be the police, medical professionals, U.S. Embassy officials, or others as appropriate. Begin documenting everything that occurs as soon as possible.
3. **Inform the insurance company:** Contact Assist America by calling +1 (609) 986-1234. Assist America must be notified as soon as possible in order to arrange missing person services.
4. **Communicate a plan with the group:** Assure the group's safety, make and communicate immediate plans and expectations regarding the group's response. Clearly define any specific roles needed in the group.
5. **Contact Truman:** Contact CIEA using established communication methods or via the University Police (+1 (660) 665-5621). CIEA will then notify the appropriate Truman administrators and officials, based on the needs of the situation. At that time, a decision will be made regarding the notification of student emergency contacts.
6. **Encourage** student participants/course leader to get in touch with their emergency contact(s).
7. **Talk to all program participants** to see how they are feeling. Answer questions, provide information, and offer encouragement.
8. **Complete an incident report** detailing what has occurred.
9. **Keep CIEA informed** and updated of all actions taken, using established communication methods.

In order to prevent a situation in which a student becomes missing, assign a strict buddy system in order to build a group culture in which everyone looks out for each other. By assigning meeting places (primary as well as secondary) for each location visited, you can have a point where the missing student should return if they are temporarily lost. It is easy to forget to assign meeting locations. However, doing so is incredibly important when such a situation arises.

## Death of a Student/Course Leader

1. **Visually verify the incident** and the identity of the student/course leader.
2. **Begin a chain of local action:** Seek immediate medical care and contact the local authorities in the host country. This could be the police, medical professionals, U.S. Embassy officials, or others as appropriate. Begin documenting everything that occurs as soon as possible.
3. **Communicate a plan with the group:** Assure the group's safety, make and communicate immediate plans and expectations regarding the group's response. Clearly define any specific roles needed in the group.
4. **Inform the insurance company:** Call CISI at 1-800-303-8120. CISI covers repatriation of remains.
5. **Contact Truman:** Contact CIEA using established communication methods or via the University Police (+1 (660) 665-5621). CIEA will then notify the appropriate Truman administrators and officials, based on the needs of the situation, including the Dean of Students and University Counseling Services. At that time, a decision will be made regarding the notification of student emergency contacts.
6. **Encourage** student participants/course leader to get in touch with their emergency contact(s).
7. **Work with Truman:** Course leaders will work with Truman and the insurance company to start the process of repatriation of remains.
8. **Talk to all program participants** to see how they are feeling. Answer questions, provide information, and offer encouragement.
9. **Complete an incident report** detailing what has occurred.
10. **Keep CIEA informed** and updated of all actions taken, using established communication methods.

### Situation in a Host Country Causes Concern (natural disaster, political uprising, etc.)

1. **Seek a secure location:** Follow local disaster warnings and advice, as well as any U.S. Embassy/State Department orders/guidelines.
2. **Account for all participants** in person
3. Be prepared to **use alternative methods of communication** in the case cellular/internet services may be impacted.
4. **Begin a chain of local action:** Contact the local authorities in the host country. This could be the police, medical professionals, U.S. Embassy officials, or others as appropriate. Begin documenting everything that occurs as soon as possible.
5. **Inform the insurance company:** Call Assist America +1 (609) 986-1234. Assist America provides comprehensive security evacuation in specific cases.
6. **Contact Truman:** Contact CIEA using established communication methods or via the University Police (+1 (660) 665-5621). CIEA will then notify the appropriate Truman administrators and officials, based on the needs of the situation, including the Dean of Students and University Counseling Services. At that time, a decision will be made regarding the notification of student emergency contacts.
7. **Encourage** student participants/course leader to get in touch with their emergency contact(s).
8. **Talk to all program participants** to see how they are feeling. Answer questions, provide information, and offer encouragement.
9. **Complete an incident report** detailing what has occurred.
10. **Keep CIEA informed** and updated of all actions taken, using established communication methods.

CIEA Staff will continuously monitor the situation and make recommendations to the course leader, based upon advice of other professional contacts in the field and that of the Truman administration.



CENTER FOR INTERNATIONAL EDUCATION ABROAD