Faculty-Led Study Abroad Programs

FACULTY LEADER HANDBOOK
Policies & Procedures
2019
# Table of Contents

## Contacts List

- page 4

## Getting Started on a Faculty-Led Study Abroad Program

- pages 5-6
  - Criteria for Leading a Faculty-Led Study Abroad (FLSA) Program
  - How and When Do I Submit a Proposal?
  - Proposal Deadlines
  - What About Faculty Compensation?
  - Budgetary Issues
  - Who Can I Talk to About My Proposal?
  - Questions?

## Getting Started on a Faculty-Led Study Abroad Program Proposal: Questions to Consider

- pages 7-13
  - Is Leading a Short-Term Study Abroad Program Right For You?
  - What Are the Responsibilities of Being a Faculty Leader or Co-Leader?
  - Where Should You Go?
  - When Should You Go?
  - What Course Should You Teach?
  - What Would It Involve to Include a Service-Learning Component?
  - Who is Your Target Audience and How Will You Recruit Them?
  - Where Should You Go for Excursions?
  - What Size Group is Right?
  - What Program Model Works Best for Your Site and Course?
  - Can Everyone Afford It?
  - How and When Do I Submit a Proposal?

## Faculty-Led Study Abroad Proposal Guidelines

- pages 14-19

## Useful Links to Required Forms

- pages 17-18

## Faculty Trip Leader Checklist

- pages 19-21
  - Getting Started
  - Next Steps
  - Getting Ready to Leave
  - In Destination Country
  - Back in SF

## Policies & Procedures

- pages 22-28
  - Program Policy
  - Course Objectives
  - Faculty Leader Responsibilities
  - CEL Responsibilities
• Safety, Security & Risk Management
• Mandatory Student Pre-Departure Orientation Meeting
• Mandatory On-Site Student Orientation Meeting

Mandatory Foreign Travel Insurance  

Developing a Budget/Determining Program Costs  

Creating a Successful Pre-Departure and On-Site Student Orientation Program  

- Pre-Departure Orientation  
  1. Logistical  
  2. Academic Policies  
  3. Health, Safety & Legal Issues  
  4. Group/Team Building  
  5. Country/Culture Awareness  

- On-Site Orientation  
  1. Arrival & Survival  
  2. General On-Site Orientation Meeting  
  3. Program Calendar  
  4. Money & Banking  
  5. Communications  
  6. Transportation  
  7. Health & Safety
Faculty-Led Study Abroad Program
College of Extended Learning

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All documents and forms included in this booklet are also on the web at the following URL address:
Getting Started on a Faculty-Led Study Abroad Program

Thank you for your interest in exploring the possibility of developing and directing a faculty-led study abroad program! The following information was prepared to help potential faculty leaders think through the planning and proposal process. If you don’t know much about leading such a program, we encourage you to read the information that follows and to talk with Mr. Ge-Yao Liu, Associate Director of Center for Global Engagement with the College of Extended Learning (gyliu@sfsu.edu/415-338-1438) as well as to colleagues who have directed programs in the past. Proposals are due at least 8 months in advance of your planned departure date, and you will probably need at least a semester (or more) of lead time to prepare. We look forward to working with you during this early phase of your program.

1. Criteria for Leading a Faculty-Led Study Abroad (FLSA) Program

- Any SFSU faculty member may propose and lead an FLSA Program regardless of faculty status or rank (tenure, tenure track, lecturer, retired).
- All faculty leaders must have completed one year of service with SFSU at the time the proposal is submitted.
- All faculty leaders must have written approval from both their department chair and college dean.
- All program leaders or assistants are expected to travel and stay with student participants throughout the entire course of the program. Running a FLSA Program can be very challenging and is very different than the traditional faculty role found on campus. Faculty leaders are the primary point of contact when abroad with students and are required to wear many hats: professor, representative for SFSU, counselor, disciplinarian, confidante, on-site expert, etc.
- Two faculty leaders may choose to work together and co-lead a FLSA Program. The budget will need to be developed carefully to ensure the program is able to cover the added costs associated with having a second program leader. Often times this means the minimum student enrollment will be higher or faculty leaders will need to be able to find economical ways of keeping program costs low, as to not make the price of the program prohibitive.
- If each faculty leader is from a different academic department/college, approval is required from both academic department chairs and college deans.
- We recommend a student/faculty leader ratio of no more than 15 students for each faculty leader (15:1). If more than 15 students, then a second SFSU faculty member must be appointed co-leader and meet all of the same requirements as the primary faculty leader.
- Only in extraordinary circumstance (death in the family, sudden illness, etc.) will any requests for modification of these criteria be considered.

2. How And When Do I Submit A Proposal?

The first step in the process is to schedule an “In-Take Meeting” with Mr. Ge-Yao Liu, Associate Director of Center for Global Engagement with the College of Extended Learning (gyliu@sfsu.edu/415-338-1438)

We also strongly recommend that you read the helpful “Faculty Leader Information” on CEL’s Faculty-Led Study Abroad Programs website at: https://cel.sfsu.edu/studyabroad
Proposal Deadlines: For programs taking place during winter session, you must submit your completed proposal no later than May 1; for summer session programs, you must submit your completed proposal before October 1; for programs taking place during the spring break, you must submit your completed proposal before August 1; for programs taking place during the fall break, you must submit your proposal before April 1; all completed proposals must be received at least 8 months in advance of your scheduled departure date.

We require that all proposals be submitted to our office at least 8 months in advance of your scheduled departure date because of the lengthy on-campus approval process that is due to the following reasons:

- Chancellor’s Office Executive Orders require the campus President to approve all faculty-lead study abroad programs;
- Before your proposal can be submitted to the President, however, it must be carefully reviewed by several offices including your department chair, dean, Risk Management, CEL CFO/Budget Director and finally by the Provost;
- In certain cases, your proposal may also require review and approval by both campus legal counsel as well as by the Chancellor’s Office in Long Beach.

Therefore we require summer proposals no later than October 1st; winter proposals no later than May 1st; spring proposals no later than August 1st; fall break proposals no later than April 1 so that there will be sufficient time for you to market your course to prospective students as well as to make the necessary arrangements (visas, airline reservations, orientation, etc.) AFTER your proposal makes it through the on-campus review and approval process.

3. What About Faculty Compensation?

Faculty may choose to receive their salary and/or obtain reimbursement of their trip-related expenses; however, trips must not run a deficit and must generate sufficient income to cover all program-related expenses and overhead. CEL does not cover the cost of faculty passports or routine immunizations or first-aid training; any and all faculty expenses to be covered by the program must appear in the program's approved final budget.

4. Developing a Budget/Determining Program Costs?

It is critically important to make sure that all program/operating costs are covered by revenue (tuition) and that you develop a “Budget Shortfall Plan” detailing how you intend to compensate for any budget shortfall if the program does not meet minimum enrollment requirements.

5. Who Can I Talk to About My Proposal?

Before you submit a proposal, we highly recommend that you contact Mr. Ge-Yao Liu, Associate Director of Center for Global Engagement with the College of Extended Learning, to schedule an In-Take meeting so that we can discuss your ideas.

6. Questions?
Faculty-Led Study Abroad Program
College of Extended Learning

Getting Started on a Faculty-Led Study Abroad Program Proposal:
Questions to Consider

Thank you for your interest in exploring the possibility of developing and directing a faculty-led study abroad program! The following information was prepared to help potential faculty leaders think through the planning and proposal process. If you don't know much about leading such a program, we encourage you to read the information that follows and to talk with Mr. Ge-Yao Liu, Associate Director of Center for Global Engagement with the College of Extended Learning (gyliu@sfsu.edu/415-338-1438) as well as with colleagues who have directed programs in the past. Proposals are due approximately eight months in advance of your planned departure date, and you will probably need a semester of lead time to prepare. We look forward to working with you during this early phase of your program.

I. Is Leading A Short-Term Study Abroad Program Right For You?

- Are you adventurous, flexible, adaptable? Will you be able to maintain your composure and improvise if things don't go as planned? Remember that travel is full of unexpected events.
- Do you enjoy spending time with students in a non-academic setting and helping them with non-academic matters? You may have to deal with homesickness, lost passports, conduct issues [excessive partying, lateness], family emergencies, roommate or host family issues, and more!
- Do you have a sense of humor? VERY important!
- Are you a good organizer and bookkeeper? You will need to gather cost information, develop a budget (with our help), and stick to it. You will be entrusted with thousands of dollars of University funds and will have to properly account for how you spend them. At the same time you will have to teach your course(s) and grade assignments.
- Do you have the time (for preparation, program, and wrap-up)? Will other obligations permit you to recruit students, attend several pre-departure meetings, invest time in budget and itinerary planning, go abroad, and come home to deal with financial reconciliation and the program report?

II. What Are The Responsibilities Of Being A Faculty Leader Or Co-Leader?

1. Student Recruitment And Preparation:

- Promote program (class visits, e-mail, word of mouth, etc.).
- Organize and facilitate several interest meetings.
- Interview and select applicants.
- Organize at least both a pre-departure and on-site orientation meeting.
- Disseminate site-specific orientation materials to students, including a day-by-day program itinerary, faculty pre-departure and on-site contact information, and student housing
information (with copies to Enterprise Risk Management and the College of Extended Learning [CEL]).

2. **Program Planning And Design:**

- Establish program itinerary.
- Make flight/transportation arrangements.
- Organize and plan all group trips and events (academically and culturally relevant excursions, speakers, farewell dinner, etc.).
- Liaise with overseas agents and vendors (host institutions, hotels, travel agency, housing coordinator, etc.).
- Establish preliminary and final program budgets to be reviewed by your specific academic department chair and college dean, CEL Budget Office, etc.
- Attend pre-departure meetings/faculty orientation held by CEL/ERM.

3. **Academic Responsibilities:**

- Distribute course syllabi to students (one for each course), with copy to CEL/ERM.
- Teach course(s) approved on program proposal with the appropriate number of contact hours.
- Obtain any necessary approvals from the Dean & Chair of your specific academic college/department.
- Collect copies of syllabi for courses taught by on-site faculty and submit to CEL/ERM.
- Select and arrange for local guest lecturers to enrich course(s).
- Oversee drop/add procedure where applicable.
- Oversee course registration and payment process.

4. **On-Site Responsibilities:**

- Fly outbound with students; if not returning with students, then accompany them to the airport and through the check-in process, remaining at airport until their flight has departed.
- Check in with Enterprise Risk Management/CEL upon arrival at your program site.
- Participate in group excursions and events.
- Provide students and Risk Management/CEL with faculty contact information during program free periods; collect such information from students.
- Proactively assist students as needed with logistical challenges (how to ride public transportation, change money, use a telephone, etc.).
- Respond in a timely manner to students in crisis (accident, illness, family problems at home, etc.); contact Risk Management/CEL about serious cases.
- Monitor group dynamics and activities as is feasible and intervene as needed.
- Promptly report to Risk Management/CEL and document any inappropriate student behavior of which faculty is informed.
- Monitor spending against program budget.
- Schedule time shortly before close of program to meet with students for debriefing/program assessment; actively encourage students to complete program evaluation forms immediately upon return to the U.S.

5. **Post-Program Responsibilities:**

- As required by Fiscal Affairs, reconcile budget/cash advance with original receipts within 30 days of end of program.
• Submit program report to CEL within 30 days of end of program.
• Submit final course grades in a timely manner.

6. **Compensation** (assuming that program meets minimal enrollment goal):

• Faculty leaders may choose to receive their salary and/or be reimbursed for their expenses (if program generates sufficient income).
• Program expenses paid as budgeted for the duration of the program (normally includes group airfare, U.S. and international ground transportation, per diem, lodging, group excursions and events)

**III. Where Should You Go?**

• Where in the world have you **lived and traveled**? Where might you feel comfortable leading a group? Do you have a working knowledge/fluency in any foreign languages? You should have a certain level of logistical expertise at your program site, and academic expertise will be necessary for sound and rigorous courses.
• What sites relate best to your **discipline area**? What sites might appeal to students? Remember that students may be less interested in the courses or area of study than they are in the site. But don't force a fit; the site and the course material should logically connect.
• Where do you have **professional contacts**? For example, perhaps you know of a host institution where you could hold classes, or which may provide housing for you and your students? Or, you may know a person who could help with on-site logistical arrangements.
• Where does the **University have an infrastructure or contacts**? If you haven't traveled much and have few or no leads of your own, you may want to consider building on what SF State already has. We have resident directors and contacts in many countries around the world.
• Where is the University **under-represented**? Broadly-speaking, we are under-represented in Africa, Central/South America, & in Central and South Asia. We strongly encourage faculty with ties and expertise in these areas to develop new programs.

**IV. When Should You Go: Summer, Winter, Spring, Fall Break?**

• Is your site **more pleasant in winter or summer**? Do you have other obligations during either term? Think about research, teaching, conferences, child care, family events, etc. When can your **host(s) best accommodate the group**? Maybe they have other groups coming in January or June, or the locals are away on holiday during all or part of the month. When would the costs of travel, accommodations, etc. be more reasonable?

**V. What Courses Should You Teach?**

• Do any of your **usual course offerings** lend themselves to being taught at a particular site? Think about what advantages the site lends to your course material. Try to choose courses that will allow you to get the students out of the classroom and incorporate things like attendance at performances, visits to companies or museums, city walkabouts, interviews, observations (data collection), interaction with locals, etc.
• Will you be able to **cover necessary course material** abroad? Remember that, as a rule of thumb, a 3-credit course meets for approximately 35 hours (not counting breaks); courses abroad should hold to similar standards. Though instruction abroad often takes place outside of the classroom, it is often not the case that each hour of a course-related excursion is as
content-rich as each hour of traditional classroom instruction. Tours are meant to enhance instruction, not replace it. A rule of thumb is that two hours of out-of-class instruction count as one hour of traditional instruction. However this will necessarily depend on the nature of the excursion and the individual who delivers the content. For example, a superficial museum tour typically booked by tourist groups may not be considered the academic equivalent of an in-depth lecture given especially to your students by a local art historian.

- Should the program be **co-sponsored** (the course is co-taught by a faculty co-leader in a different academic department)? Think about what disciplines go well together. Is there a colleague in another department with whom you might like to travel? Co-sponsored arrangements work best when both faculty are recruiting from similar large pools of students (for example Political Science and Foreign Languages) and when they are equally committed to the program. If your department is large enough, both leaders could come from the same department; this is a good way to train new faculty leaders.

- Try to choose a course that **fulfills requirements** for your target audience (such as group requirements in Arts and Science, major/minor requirements, multicultural requirement).

- If you wish to offer an **experimental course**, keep in mind that the course may be put forward for permanent status only after it has been offered a certain number of times. In addition, note that experimental courses may not fulfill any requirements, since they do not appear in the catalog. It is the faculty leader's responsibility to obtain approvals from the appropriate college and/or University committees in order for experimental courses to fulfill such requirements. Since knowledge of the host location is critical, experimental courses that are designed to jump from one destination to another should be avoided.

**VI. What Would It Involve To Include A Service-Learning Component?**

- Study abroad faculty leaders are encouraged to add a service-learning component to the existing academic courses on their programs. Service-learning courses abroad are first and foremost academic courses with lectures, readings and reflective assignments that integrate the academic theory learned in class with hands-on experience. The service component may count towards the minimum contact hour requirement, with the weight of a lab or practicum (2-to-1 in most cases). Study abroad programs include two courses for a total of 6-7 credits, with the following rubric recommended for programs involving service:

  1. 3 credit service-learning course with a minimum of 15-20 lecture or discussion hours and a maximum of 20-35 hours of service
  2. 3-4 credit traditional academic course

- For more information, visit the [SF State Institute for Civic & Community Engagement’s website](http://icce.sfsu.edu/)

**VII. Who Is Your Target Audience And How Will You Recruit Them?**

- Is the program relevant only to a **specific major or other group**? If so, can the program attract enough students from this group to remain solvent? This approach can be risky, but not impossible to put together.

- Can you target **feeder courses**? For example Foreign Language programs that offer Spanish, French, or German 101 target students in the lower level course, 100.
• Is the program targeted to **too wide an audience**? If the program appeals to everyone but is not targeted at any specific group, then where do you recruit? You have to rely on the attractiveness of the site.

• How will you **recruit**? Your department/college/CEL may be able to post your program on their website, advertise your interest meetings, and can produce a color poster/flyer, if necessary. We highly recommend that you e-mail students in target majors and/or target courses. Classroom visits can also be very effective. If colleagues don't permit class visits, ask them if they would be willing to distribute handouts and mention the program to their students.

**VIII. Where Should You Go For Excursions?**

• Faculty-led study abroad programs are not "educational tours" and should not involve students spending most of their time on a bus or plane together as a group. Most excursions should be directly related to your academic course; others should focus on the history or culture of the host site. Activities that are essentially tourism or that have nothing more than recreational value should not be included in the program; students may choose to engage in such activities during their free time and with their own funds.

• What excursions make sense from a **cultural standpoint**? For example, if in Rome, the Vatican is a must.

• What excursions make sense from an **academic standpoint**? Remember that you are not taking students on a vacation tour. One of the reasons for your program is to enable them to engage in learning that they would not likely be exposed to if they went abroad themselves as tourists. Typical tourist fare should be avoided, even if it seems relevant to your course. Giving students a more authentic experience, with as much in-depth contact with the host culture and environment as possible, will provide a more fulfilling, memorable, and educational program.

• What excursions give the most **bang for their buck**? Consider distance, time, and expense. Is this excursion going to be worth the time and money? Is it relevant enough to the program's core component—the courses—that it's worth the investment of limited resources (time and money)? What would you gain if you didn't go? (A lower program fee? More free time? A slower-paced program?) What would you gain if you did go? (Nothing more than a "selling point" for recruitment purposes? A valuable educational and course-related experience?)

**IX. What Size Group Is Right?**

• Programs generally enroll between 8 and 15 students. The **preferred Risk Management ration of faculty-to-students is approximately 15 students per faculty member**. A program with more than 15 students may require two faculty leaders, a volunteer or other assistant. Please remember that you will also need to recruit enough students to cover any expenses (for example, your faculty salary and trip-related expenses) for which you would like to obtain reimbursement. Faculty who wish to receive their faculty salary and/or claim reimbursement of any trip-related expenses will need to recruit enough students so that the tuition generated is sufficient to cover all program costs. (Note that any non-traditional students on your program [for example older matriculated students, non SF State students, SF State employees] are treated the same with regard to application procedures, payments, lodging, courses, and all other program aspects.)

• Apart from Risk Management/CEL guidelines, there are other questions to consider regarding group size. **How many students can your host site handle (housing, site visits, buses)?** Can you trek through the wilderness (or stroll through a museum or visit a local school) with 25 students? With 30?
• **How many students can your course handle?** Think about time for discussion, presentations, field work, and access to facilities. What are the typical enrollment limits for such a course on campus? How might this need to be changed abroad?

• **How many students can you handle?** This answer will be determined in part by your level of comfort with the host site, your support system at the host site, and your ability to handle multiple students’ problems.

X. **What Program Model Works Best For Your Site And Course?**

• In keeping with the *Standards of Good Practice for Short-Term Education Abroad Programs* issued by the Forum on Education Abroad in January, 2009, faculty should design programs around one or two primary locations which are closely linked to the program's academic content, and with short, class-related excursions originating from those locations as necessary. Programs which involve multiple in-country or intra-country flights and/or long bus rides are often more expensive than more stationary programs and do not grant students the same opportunities to become well-acquainted with a particular site and its inhabitants. In addition, extensive travel increases the risk of serious disruptions in the program itinerary (for example, due to weather or strikes, missed connections, etc.), as well as unduly complicates the management of student crises (because the group must be prepared to move on to the next location). If it is safe to do so, faculty leaders may build a small number of free days into their program itinerary (typically 2-3) during which students and faculty may choose to travel on their own and at their own expense if they wish.

XI. **Can Everyone Afford It - Faculty, Students, Your Department/College, CEL?**

• Will overall program costs be reasonable? Students on SF State's programs pay not only tuition but also additional costs which will differ from program to program (consisting of airfare, housing, excursions, meals, ground transportation, site-specific fees [exit tax, visa], mandatory travel insurance, etc.). You have no control over tuition, nor do you have much control over costs at your host site, but keep in mind that many of the choices you make about your program will impact the other costs that students will incur. For example, extra travel (particularly intra-country flights) increases program costs. Also keep in mind that students may not appreciate paying too many extra "hidden costs" (such as local ground transportation/subway costs, meals, etc.).

• Will other expenses be reasonable? Additional expenses directly related to instruction that may be “extra” include expenses for guest lecturers, facility rental, phone calls, etc. If expenses in one of these areas is unusually high at your site, think about how you can lower costs in other areas.

• What about faculty compensation? Faculty may choose to receive their salary and/or obtain reimbursement of their trip-related expenses (lodging, per diem, ground transportation in the U.S. and abroad, excursions, and site-specific expenses such as airport taxes), depending on the income that their program generates. CEL does not cover the cost of faculty passports or routine immunizations or first-aid training; any and all faculty expenses to be covered by the program must appear in the program's approved final budget.

• Will the program attract the **minimum number of students** necessary? What happens if it doesn't? If a program’s budget is in the red due to under-enrollment, we usually work with the faculty to reach a compromise on their compensation (for example a reduction or relinquishing of per diem, ground transportation, or other items.) On occasion, a faculty member's department or college has agreed to pay all or a portion of the budget shortfall. If no
agreement can be reached, or if there are too few students to sustain the program, then the program will be cancelled.

XII. How and When Do I Submit A Proposal?

The first step in the process is to schedule an “In-Take” meeting with Mr. Ge-Yao Liu, Associate Director of Center for Global Engagement with the College of Extended Learning (gyliu@sfsu.edu/415-338-1438)

- We also strongly recommend that you read the helpful “Faculty Leader Information” on CEL’s Faculty-Led Study Abroad website at: https://cel.sfsu.edu/studyabroad
- **Proposal deadlines**: For winter session, the deadline is June 1st, about 8 months in advance of your planned departure date. For summer session, the deadline is October 1st, also 8 months in advance of your scheduled departure date, while the deadline for Spring Break is August 1st.
- We require that all proposals be submitted to our office at least eight months in advance of your scheduled departure date because of the lengthy on-campus approval process. Chancellor’s Office Executive Orders require the campus President to approval of all faculty-lead study abroad programs. Before your proposal can be submitted to the President, however, it must be carefully reviewed by several offices including your department chair, college dean, Enterprise Risk Management, CEL Budget Office finally by the Provost. In certain cases, your proposal may also require review and approval by the Chancellor’s Office in Long Beach. In addition, students want to know in advance what their study abroad options are. Therefore we require winter proposals no later than May 1st, summer proposal no later than October 1st and Spring Break proposals no later than August 1st so that there will be sufficient time for you to market your course to prospective students as well as to make the necessary arrangements (visas, airline reservations, orientation, etc.) **AFTER** your proposal makes it through the on-campus review and approval process.
- **Who can I talk to about my proposal?** Before you submit a proposal, we highly recommend that you contact Mr. Ge-Yao Liu, Associate Director of the Office of Global Engagement with the College of Extended Learning (gyliu@sfsu.edu/415-338-1438) to schedule an In-Take meeting so that we can discuss your ideas.
- **Questions?** Feel free to contact Mr. Ge-Yao Liu, Associate Director of the Office of Global Engagement with the College of Extended Learning (gyliu@sfsu.edu/415-338-1438)
Faculty-Led Study Abroad Program  
College of Extended Learning  

Faculty-Led Study Abroad Proposal Guidelines

• Basic Description of the Program:

  1. Location?
  2. Length of program?
  3. At which academic institution abroad will the program take place, if any?
  4. What is the sponsoring academic unit(s)?
  5. Dean & Department Chair endorsement required
  6. What are the minimum and maximum number of students that the program can accommodate/minimum viable enrollment? Please provide a rationale for these numbers.
  7. Supplemental program activities (excursions, site visits, etc.)?
  8. Will you and/or any of your participants be working with minors while overseas as part of your program? If so, please explain.
  9. Will you be bringing any university equipment with you on your trip? If so, please explain.
  10. Any use of Unmanned Aerial Vehicles (Drones) requires formal university approval. Will you be using a drone while abroad?
  11. What is your current appointment/position with SF State (faculty [tenured, tenure track, lecturer], Staff, etc.)? With which SF State department/college are you associated?

• Rationale for Location:

  1. Why overseas?
  2. Any conflicts with other programs already established?
  3. What is the evidence for the demand by students?
  4. How was the site chosen and evaluated?
  5. Have you conducted a site visit? Please provide details.

• Academic Program Abroad

  1. Please describe the instructional program.
  2. How many units?
  3. Academic term: Summer? Spring/Winter Break?
  4. Tentative departure and return dates?
  5. What majors can be accommodated?
  6. Classroom contact hours?
  7. What are the teaching facilities on-site?
  8. How is the site incorporated into the pedagogy?
  9. Who is grading the students and based upon what?
  10. How will this experience be integrated upon return to SF State?
  11. Please provide a detailed course description and syllabus
• **Student Learning Outcomes:**

  1. Please articulate goals/purpose of your proposed study abroad trip for you and your students;
  2. What is the desired impact on your students?
  3. What strategies will you use to increase the chances of meeting these goals?

• **Student Eligibility**

  1. Academic requirements?
  2. Are only SF State students eligible?
  3. Are non-SF State students eligible to participate?
  4. Are non-students allowed?
  5. Will any minors (under the age of 18) participate on the trip?

• **Detailed Program Itinerary**

  1. Please provide a detailed day-by-day itinerary including all side-trips and any layover destinations.
  2. Please include contact information (email, telephone, web address, etc.) for any & all groups, organizations and individuals that you will be working with.
  3. Please also include a rationale which relates the itinerary to the academic goals of the course.

• **Risk Assessment**

  1. Your assessment, as Faculty Leader, of risk factors.
  2. Has a physical onsite assessment been performed? Please describe. If not, please provide as much information as possible from your location research to properly assess the risks associated with the proposed location.
  3. How you plan to handle emergency situations that may arise?
  4. What is your emergency response plan?
  5. What happens if you (as the faculty leader) become injured/ill/die during the trip? Who will assume leadership of the group?
  6. Please describe your previous experience(s) in the country(ies)/culture(s) to be visited (and/or an indication of how you plan to acquire additional knowledge).
  7. Please describe any previous experience with leading student groups off-campus.
  8. Please describe your language skills and/or in-country experience, if appropriate to the course.
  9. Please provide info on your contacts in the location.
10. Describe any support services abroad.
11. Requirement for faculty member to complete a first-aid class (including CPR) with the American Red Cross; please provide certificate of completion to CEL.
12. What will be the adult-to-student ratio for your study trip?
13. Acknowledgement of the need/requirement for CSU Travel Insurance
• **Orientation Programs**

1. Your acknowledgement, as Faculty Leader, of the need/requirement for both a pre-departure and on-site orientation program for your students.
2. Please describe the information to be included in both the pre-departure and on-site orientations.
3. Your acknowledgement of a mandatory orientation meeting for all faculty leaders.
4. Please provide a detailed outline for both a pre-departure and on-site orientation which you will conduct for your participants.

• **Lodging/Logistics/Transportation**

1. Please describe room and board accommodations for the students/faculty leader.
2. Please describe both transportation to and from the U.S. as well as any in-country transportation you will be utilizing.

• **Third Party Providers/Vendors?**

1. Do you plan to work with any third party providers/vendors for your study abroad program?
2. If so, please note that if you will be working with a provider that runs study abroad programs in which SF State sends students to their program (CIEE, IES, CEA, Butler, etc.) or with providers that act as the logistical support for an SF State study abroad program, Executive Order 1081 from the CSU Chancellor’s Office establishes strict policies and procedures related to the review and approval of all third party study abroad providers/vendors contracted by SFSU. SF State is required to follow a very specific process for the review and approval of all such providers.

• **Recruitment Strategy**

1. Please describe how you will recruit the minimum number of students needed to run the program.
2. Strategies may include: working with other faculty members in your department; cross-listing your course with another department; staffing an info table at an SF State study abroad fair; social media; classroom visits; student organizations; alumni engagement; targeted emails to students in certain majors, Dean’s List, etc.; flyers/printed media, etc.

• **Detailed Budget Plan**

1. Please include a detailed program and student budget.
2. Please also indicate whether you would like to obtain either reimbursement of your expenses, or your salary, or volunteer (no reimbursement/salary) as part of your budget proposal.
3. Please provide a detailed budget detailing both your expenses as faculty leader as well as expenses per student.
4. Items to include in your detailed budget include: salaries, if applicable; travel expenses; tuition & fees to host institution & to SF State; excursions, cultural activities, service learning, etc.; administrative fees; student accommodations & meals; transportation; visas; travel insurance; any additional costs/incidentals?
5. Budget Shortfall Plan? How do you plan to compensate for any budget shortfall if the program does not meet the minimum required enrollment?

- Evaluation plan
  1. Please describe how you plan to assess the program (on-site, upon your return)
  2. How will the information you gather be used to review, analyze & improve future programs?
ATTESTATION OF ACCURACY

I attest that all of the information provided in this faculty-led study abroad trip proposal is true and accurate to the best of my knowledge. I understand that any false information provided in this proposal may result in the faculty-led study abroad proposal being denied or the trip being cancelled. I agree that any changes or modifications to the information in this proposal will be presented to the College of Extended Learning (CEL) and Enterprise Risk Management (ERM) for review and approval. Any changes must be approved in writing by CEL and ERP prior to trip departure.

Faculty Trip Leader #1 Name  Department  College

______________________________________  ____________________________
Faculty Trip Leader #1 Signature  Date

Faculty Trip Leader #2 Name  Department  College

______________________________________  ____________________________
Faculty Trip Leader #2 Signature  Date

Faculty Trip Leader #3 Name  Department  College

______________________________________  ____________________________
Faculty Trip Leader #3 Signature  Date

Note: Proposal needs to be reviewed and approved on next page by both the Department Chair and College Dean before submitting to CEL.

DEPARTMENT CHAIR AND COLLEGE DEAN APPROVAL

My signature below verifies my support for and approval of the attached proposal & budget for a faculty-led study abroad trip.

______________________________________
Department Chair’s Name

______________________________________
Department
Getting Started on a Faculty-Led Study Abroad Program

Useful Links to Required Forms

CEL Special Sessions Academic Course Request Form:
https://cel.sfsu.edu/sites/default/files/documents/facultyleader/special-sessions-course-request.pdf

Request for Authorization to Travel/Travel Advance Form:
http://fiscaff.sfsu.edu/sites/default/files/forms_documents/RAT_03_2017_0.pdf

Request for Foreign Travel Insurance Packet:
http://erm.sfsu.edu/sites/sites7.sfsu.edu.safetyriskmgmt/files/FTIP_All_packet.pdf

Includes:
1. Foreign Travel Checklist
2. Instructions to Complete Request for Foreign Travel Insurance Forms
3. Request for Foreign Travel Insurance Program (FTIP) Coverage
4. Foreign Travel Schedule
5. Participant List

Request for Travel Approval to High Risk Country:

High Hazard Countries List:
http://erm.sfsu.edu/content/forms

Release of Liability Packet (for students, volunteers and other non-employee travelers):
http://erm.sfsu.edu/content/forms

Release of Liability Foreign Travel:
http://erm.sfsu.edu/sites/default/files/Release%20of%20Liability_2018_Foreign_Travel.pdf

Includes:
1. Student Acknowledgement of Travel Risks
2. Release of Liability, Promise Not to Sue, Assumption of Risk and Agreement to Pay Claims

Request to Appoint Volunteer Form:
http://hr.sfsu.edu/sites/default/files/Request%20to%20Appoint%20Volunteer.pdf

Student Agreement Form:
https://cel.sfsu.edu/sites/default/files/documents/facultyleader/student-agreement.docx
Medical/Insurance Verification & Authorization Form:
https://cel.sfsu.edu/sites/default/files/documents/facultyleader/medical-insurance-evaluation.docx

Summary of CSU Foreign Travel Insurance Coverage:
http://erm.sfsu.edu/content/forms

Participant List:
http://erm.sfsu.edu/sites/default/files/Participant%20List.pdf

Incident Report Form:
https://cel.sfsu.edu/sites/default/files/documents/facultyleader/incident-report.docx

Student Evaluation Form:
https://cel.sfsu.edu/sites/default/files/documents/facultyleader/student-evaluation.docx

Faculty Evaluation Form:
https://cel.sfsu.edu/sites/default/files/documents/facultyleader/faculty-evaluation.docx
Faculty-Led Study Abroad Program
College of Extended Learning

Faculty Trip Leader Checklist

Getting Started

☐ Check the U.S. State Department Web site to make sure that there is no “Travel Warning” issued to the destination country. If there is a Travel Warning, the trip cannot not take place.

☐ Any group that is traveling to a high-hazard country must receive written permission to travel from the Chancellor’s office.

☐ Schedule an “In-Take” meeting with Mr. Ge-Yao Liu, Associate Director of Center for Global Engagement with the College of Extended Learning (gyliu@sfsu.edu/415-338-1438) to review program contents, budget, risk management issues, campus review and approval process, Chancellor’s Office Executive Orders, etc.

☐ Please submit Faculty-Led Study Abroad CEL Special Sessions Academic Course Request Form with both the Department Chair and Dean’s signature to CEL
https://cel.sfsu.edu/sites/default/files/documents/facultyleader/special-sessions-course-request.pdf

The University strictly adheres to the CSU and SF State campus fiscal policies that restrict individual University employees from accepting student money. This includes the Faculty Leader for Study Abroad programs. Therefore, it is best for the Faculty Leader to find a travel agency and/or airline company that may accept student money directly. Students must use their own credit cards or make checks payable to the travel agency and/or airline for their share of the cost of airline tickets, lodging accommodations, transportation, etc.

Next Steps

☐ Read Policies & Procedures and Managing Emergencies Abroad.

☐ Read and enforce during the program the University Standards of Student Conduct at: http://bulletin.sfsu.edu/policies-procedures/regulations-procedures/student-conduct/ and http://conduct.sfsu.edu/standards

☐ Sign a separate letter acknowledging that you have read and agree to follow the Faculty-Led Study Abroad Policies & Procedures.

☐ Provide CEL (at least 60-90 days before departure) the following:

- Participant List include Teaching Assistants and program volunteers with emergency contact information
- A detailed itinerary including names of hotels, their addresses, phone numbers and email addresses. Also include names of service providers and any instructionally related tours in destination country with contact information. Notify CEL/ERM of any changes to itinerary pre and post-departure.
- Detailed outline of both a pre-departure and on-site orientation with special reference to safety, security, and health issues to the destination country.

- Inform students of the mandatory SF State Risk Management Insurance (approximately $60-$140 per student). Distribute Travel Insurance coverage summary to students.

- Inform students of any high-risk physical activities that may be required during the trip (i.e. extensive hiking, walking, climbing up hills, rock climbing, etc.) prior to the program’s departure from the University.

- Inform students that they will not be able to travel with the group if their course registration form with payment, reimbursement for travel insurance, Medical/Insurance Verification & Authorization Form, Release of Liability, Promise Not to Sue, Assumption of Risk & Agreement to Pay Claims and Student Agreement are not received in the Office of International Programs at least 60-90 before departure.

- Inform the students that Financial Aid is not available for Study Abroad trips run through CEL Self-Support. (Please direct any questions concerning financial aid eligibility to the Office of Student Financial Aid).

- Provide students with a checklist including required vaccinations, recommended supplies and travel items, pertinent documents, list of required or recommended reading.

- Register participants online before departure at the U.S. Department of State web site at https://travel.state.gov/content/passports/en/go/step.html

- Locate the closest U.S. Embassy to their destination(s) by visiting https://www.usembassy.gov/ and provide students with Embassy contact information.

- Check to make sure that if you, a Teaching Assistant or program volunteer plan to drive while abroad, they have satisfactorily completed a CSU-approved defensive driver course within the last four years.

- Plan and schedule a pre-departure orientation meeting with your students and cover topics included in Policies and Procedures.

- CEL/ERM will organize a Mandatory “Health and Safety” Orientation meeting for you and your students and cover topics included in Policies & Procedures. Please document when and where you held the meeting. Any students not in attendance must be provided with a separate orientation and safety meeting.

- In accordance with CSU Executive Order No. 1081, the Faculty Leader agrees to attend a “Faculty Leader Orientation” meeting planned and organized by CEL/ERM.

- In accordance with CSU Executive Order No. 1081, the Faculty Leader agrees to complete an approved first-aid training course and provide CEL/ERM with a copy of your certificate of completion.

- Provide CEL (at least 60-90 before departure) with the following for each student participant:
  - Course Registration Form with payment
- A separate check for travel insurance reimbursement
- A Medical/Insurance Verification & Authorization Form
- A signed Release of Liability, Promise Not to Sue, Assumption of Risk & Agreement to Pay Claims
- A signed Student Agreement
- Xerox copy of student and faculty passports (Biographical page with participant’s photo)*
- Verification of successful completion of certified first aid course

*Please check to make sure that that passports for all participants are valid for at least 6 months after your scheduled U.S. return date. Also, participants with non-U.S. passports will need to submit a copy of their “green card” (if they are U.S. permanent residents) or a copy of their non-immigrant visa.

Getting Ready to Leave


☐ Carry Participant List and copies of student’s passports at all times. Keep copies of all passports secure.

☐ Check the U.S. State Department Web site to make sure that they have not issued a “Travel Warning” to the destination country.

In Destination Country

☐ Hold On-Site Orientation and cover topics included in Policies & Procedures.

☐ Remind students of the contact information for the closest U.S. embassy/consulate to your destination.

☐ Notify ERM/CEL of any changes to itinerary.

☐ If an Emergency Arises
  
  o The Faculty Leader will complete an Incident Report Form (https://cel.sfsu.edu/sites/default/files/documents/facultyleader/incident-report.docx) if an emergency situation arises during the program email immediately to Mr. Michael Beatty (mbeatty@sfsu.edu), Risk Manager and to the Mr. Ge-Yao Liu, Associate Director of the Office of Global Engagement with the College of Extended Learning (gyliu@sfsu.edu/415-817-4226)
  
  o Consult the Managing Emergencies Abroad manual for complete instructions on how to handle an emergency abroad.

Back in San Francisco

☐ Please turn in grades to CEL Downtown Campus (Director of Enrollment Services) or to your specific academic department/Registrar’s Office (if you run your program through State Support).

☐ Submit both student and faculty leader evaluations to CEL
San Francisco State University is committed to serving students who wish to study abroad to support, enrich and broaden learning opportunities, engage with different cultures and gain an understanding and an appreciation of, the people, the culture and the places visited.

1 Program Policy

- The program must be clearly educational in nature, and be pre-approved by the academic department and college via a signed MOU between the Faculty Trip Leader (aka “Trip Leader”), their College and CEL each time the Faculty-Led Study Abroad Program is offered.
- A Faculty-Led Study Abroad CEL Special Sessions Academic Course Request Form must be submitted to CEL each time the program is offered.
- Academic credit must be offered and all participants must register officially for credit. Audit status may be requested. If audit status is granted, participant pays full fee, but receives “audit” instead of letter grade.
- Academic standards and requirements for a Faculty-Led Study Abroad program must meet the same academic standards and requirements as on-campus courses. One semester unit of credit is allowed per week of travel and study.
- Full or part-time SF State faculty may offer a Faculty-Led Study Abroad Program through SF State.
- The Director of Procurement and/or the campus President’s designee are authorized representatives for SF State University who may sign and approve all contracts with third-party vendors – hotels, restaurants, tour operators, travel agencies, etc.
- The Faculty Leader may not accept any student money. The Faculty Leader must work through a travel agency and/or airline company for payment of student’s airline tickets, lodging accommodations, transportation, etc. Students must make checks payable to the travel agency and/or airline for their share of the cost.
- Faculty may be compensated using the CSU 2322 Salary Schedule and/or may receive reimbursement of their travel expenses; however, the program cannot run a deficit and must generate sufficient income to cover all anticipated trip-related expenses & program overhead; Faculty who run their programs through state support will want to check with their department/college regarding salary, compensation, and reimbursement of travel expenses policies and procedures.
- It is critically important to make sure that all program/operating costs are covered by revenue (tuition) and that you develop a “Budget Shortfall Plan” detailing how you intend to compensate the University for any budget shortfall if the program does not meet minimum enrollment requirements.

2 Course Objectives

- To provide teaching and learning opportunities that combine conventional coursework with on-site observations and study in international locations;
To provide faculty with opportunities for increasing knowledge in their field, making contacts with colleagues in other countries, and bringing back ideas beneficial to campus program enrichment;
To provide the University with visibility in other countries;
To provide students with short-term experiences and learning in international locations;
The program must include student learning outcomes and assessment process.

3 Faculty Responsibilities

Schedule an “In-Take” meeting with Mr. Ge-Yao Liu, Associate Director of Center for Global Engagement with the College of Extended Learning (gyliu@sfsu.edu/415-338-1438) to review program contents, budget, risk management issues and policies and procedures.

Read the information contained in Policies & Procedures and Managing Emergencies Abroad. These documents are also available on the CEL website at: The Faculty Leader will sign a separate letter acknowledging that they have read and agree to follow these policies and procedures as presented in these documents.

In accordance with CSU Executive Order No. 1081, the Faculty Leader will register participants online before departure from the U.S. Department of State web site at: https://step.state.gov/step/. The Faculty Leader will also locate the closest U.S. Embassy to their destination(s) by visiting: http://www.usembassy.gov/ and provide students with Embassy contact information. The Faculty Leader will then need to email Mr. Ge-Yao Liu, Associate Director of Center for Global Engagement with the College of Extended Learning (gyliu@sfsu.edu/415-338-1438) confirmation that all travelers have registered their trip abroad.

In accordance with CSU Executive Order No. 1081, the University will cancel the Faculty-Led Travel Study program if the U.S. State Department issues a “Travel Warning” to destination country, unless specifically exempted by the Chancellor.

The Faculty Leader must travel with the group while abroad for the complete program.

Faculty Leader must advise all participants of any high-risk physical activities that may be required during the trip (i.e. extensive hiking, walking, climbing up hills, rock climbing, river rafting, scuba diving, etc.) prior to the program’s departure from the University.

The Faculty Leader must fulfill the itinerary commitments, or their reasonable equivalents.

During the program, the Faculty Leader is responsible for knowing whereabouts of all students at all times.

The Faculty Leader will complete an Incident Report (https://cel.sfsu.edu/sites/default/files/documents/facultyleader/incident-report.docx) if an emergency situation arises during the program email immediately to Mr. Michael Beatty (mbeatty@sfsu.edu), Risk Manager and to Mr. Ge-Yao Liu, Associate Director of Center for Global Engagement with the College of Extended Learning (gyliu@sfsu.edu/415-338-1438).

Consult the Managing Emergencies Abroad manual for complete instructions on how to handle an emergency abroad.
Inform students of the mandatory SFSU Risk Management travel insurance (approximately $60-140 per student—this amount is subject to change and SF State has no control over the final amount which is based on trip destination and other factors). Faculty Leader and students will receive Travel Insurance Cards to keep with them during the duration of the program. Faculty Leader and each student will receive a Travel Insurance coverage summary.

If Faculty Leader, Teaching Assistant or program volunteer drive while abroad, they must have satisfactorily completed a CSU approved defensive driver course within the last four years.

Faculty leader is also required to plan and conduct both a pre-departure orientation as well as an on-site orientation for all participants; please see Items 6 & 7 below as well as the chapter on “Creating a Successful Pre-Departure and On-Site Orientation Program” below.

In accordance with CSU Executive Order No. 1081, the Faculty Leader agrees to complete an approved “emergency response” training course and provide CEL with a copy of your certificate of completion.

Provide students with checklist including required vaccinations, recommended supplies and travel items, pertinent documents, list of required or recommended reading.

Carry Participant List and copies of students’ passports at all times. Keep copies of all passports secure.

Inform students that they will not be able to travel with the group if their class registration form with payment, reimbursement for travel insurance, Medical/Insurance Verification & Authorization Form, Release of Liability, Promise Not to Sue, Assumption of Risk & Agreement to Pay Claims and Student Agreement are not received in CEL at least 60-90 days before departure.

Read and enforce the Standards of Student Conduct at http://bulletin.sfsu.edu/policies-procedures/regulations-procedures/student-conduct and http://conduct.sfsu.edu/standards

Faculty Leader will work with Risk Management to arrange for the purchase of travel insurance for all participants including students and the Faculty Leader, teaching assistants and volunteers (if applicable) through SFSU Risk Management. The Faculty Leader must provide Risk Management with a re-charge/charge-back account number. Each student will then be responsible for reimbursing the specific academic department/college for travel insurance. Risk Management will provide the Faculty Leader, teaching assistant, volunteers(s) and each student with a Travel Insurance Card and insurance coverage summary.

In accordance with CSU Executive Order No. 1081, the Faculty Leader will agree to attend a mandatory “Faculty Leader Orientation” planned and organized by CEL/ERM.

A. At least 8 months prior to departure, provide CEL/ERM with the following:
   o A signed and completed Course Request form. (Please note, if the course is new or unauthorized, the trip leader must contact the curriculum coordinator to determine the best way to authorize or create a new course. This should be done very early in the semester.) The Country of travel must be approved by Enterprise Risk Management per the US State Department Guidelines.
   o Trip Leader acknowledgement of reading Faculty Handbook (to CGE).
B. At least **8 months** prior to departure, the Trip Leader will provide CEL/ERM with:
   - Request to travel to High Hazard Country form to CEL (as required by Risk Management)
   - Detailed itinerary, including participant list (to CEL then Risk Management)
     This detailed itinerary will include names of hotels, their addresses, phone numbers and email addresses. Also include names of service providers and any instructionally related tours in destination country with contact information. Educational lectures must be scheduled daily with limited free time scheduled. [A detailed itinerary is needed before travel insurance can be purchased.] Notify ERM/CEL of any changes to itinerary pre and post-departure.

C. At least **60-90 days** prior to departure, provide CEL with the following:
   - Authorization to travel (to CEL then Risk Management)
   - Request for foreign travel insurance forms (to CEL then to Risk Management)
   - Faculty volunteer form (if applicable)
   - Provide CEL with verification that you have successfully completed an approved first aid course (with CPR) completion

D. At least **60-90 days** before departure, the Trip Leader will provide CEL with the following for each student: (Note: All of these items must be bundled and provided to CEL in one batch).
   - Class registration form with payment
   - A separate check for travel insurance reimbursement
   - A Medical/Insurance Verification & Authorization Form
   - A signed Release of Liability, Promise Not to Sue, Assumption of Risk & Agreement to Pay Claims
   - A signed Student Agreement
   - Xerox copy of student and faculty passports
   - Verification of successful completion of certified first aid course
   - Pre-Departure Student “Health & Safety” Orientation given by CEL
   - Pre-Departure Faculty Leader Orientation program organized by CEL

**CEL Responsibilities**

- CEL will direct/refer questions from prospective and enrolled students related to registration, fee payment and grades to the appropriate office(s)/individual(s).
- CEL will collect/forward above forms to the appropriate office/individual so that CEL may arrange to set-up courses and course sections for students each semester the study abroad experience takes place (if your program is fun through CEL Self-Support).
- At least **60-90 days** before departure, CEL will collect from the Faculty Leader the following for each student:
  - A Medical/Insurance Verification & Authorization Form
  - A signed Release of Liability, Promise Not to Sue, Assumption of Risk & Agreement to Pay Claims
  - A signed Student Agreement
  - Xerox copy of student and faculty passports
  - The Faculty Leader will also provide CEL a copy of their passport.

- CEL will give a brief Health & Safety presentation at a mandatory student Orientation Meeting and distribute related materials to students and the Faculty Leader. Included will be a
reminder for participants to carry sufficient personal medication supplies with physician documentation, eyeglass prescription, etc. This Health and Safety presentation must be documented by CEL.

- CEL/ERM will also organize a mandatory Orientation Meeting for the Faculty Leader which will cover such topics as: assessing/mitigating location and course-related risk; assessing and planning for trip operational risks; emergency preparedness/response/first aid and communications; role of faculty leaders; course registration & fee payment procedures; Faculty Leader trip reimbursement policies & forms; issues upon return to SFSU.

- CEL will verify with the Faculty Leader that “in accordance with CSU Executive Order No. 1081, the Faculty Leader & all student travelers have registered students online before departure from the U.S. Department of State Web site at: https://step.state.gov/STEP/ and have located the closest U.S. Embassy to their destination(s) by visiting: https://www.usembassy.gov/ and provided students with Embassy contact information.

- CEL/ERM will maintain originals of the Participant List (includes Emergency Contacts), all registration forms, Medical/Insurance Verification & Authorization Forms, signed Release of Liability, Promise Not to Sue, Assumption of Risk & Agreement to Pay Claims, Student Agreements and Xerox copies of Faculty Leader and student passports.

- In accordance with CSU Executive Order No. 1081, the University will cancel the Faculty-Led Travel Study program if the U.S. State Department issues a “Travel Warning” to the destination country, unless specifically exempted by the Chancellor.

- Depending on the finalized budget, CEL (or your specific academic department/college) may or may not be able to provide Faculty Leader with their faculty salary for teaching the course abroad and/or reimbursement of all travel-related expenses if the program does not generate sufficient revenue to cover all trip-related expenses and overhead, which may necessitate cancelling it.

5 Safety, Security & Risk Management

General Precautions (Recommended by the U.S. State Department)

- Blend in with the population. Do not wear identifying clothing such as a baseball cap or shirts, or T-shirts or sweatshirts with identifying information.
- Avoid predictable patterns of behavior. Do not always take the same route or stop in the same restaurant every day. Vary your travel routes.
- Be alert and observant. Report any suspicious behavior, such as being watched or followed.
- Avoid or use very special precautions around U.S. military installations and airports. Do not take photographs of military installations or airports.
- Be watchful of abandoned bags in public places, or anything sitting free which could contain an explosive.
- Do not join demonstrations. If large groups of people are gathering, leave the area.

Personal Safety and Security Practices While Abroad
- Participants should keep their passport in a safe location at all times; they should always carry a driver's license or other photo I.D., local emergency phone numbers (i.e. police, phone number to reach Faculty Leader, hotel phone number, international travel assistance phone numbers, etc.).
- Be aware of your surroundings and belongings at all times. One should be especially careful at train, subway, or bus stations where thieves prey on visitors and tourists.
- Use a money belt to carry important personal information, cash, or traveler’s checks. Men should avoid placing their wallets in their back pant pocket. Women with purses should hold their purses in front of their person.
- Travel only in well-lighted and frequently traveled areas. Avoid walking in alleys or unfrequented streets. Whenever possible, always walk with a friend or companion.
- Exercise common sense when responding to a crisis (i.e. political events or acts of war). Do not draw attention to yourself and avoid travel in the affected crisis area.

**Student Pre-Departure Orientation Meeting (Mandatory)**

- Review the final itinerary at the Pre-Departure Orientation Meeting, including modes of transportation, time differences, transfers and meeting points. Check all passports and visas (if necessary).
- Review the study abroad educational content; provide a reading list for all participants. Advise participants on course requirements, grading, expectations and evaluation.
- Remind students of the deadline to submit petition to audit the class, if needed.
- Review information regarding destination(s), i.e. cultural differences, geography, language, political climate, environmental conditions, religious considerations, etc. Discuss codes of conduct, including consuming alcohol, free time activities, etc. Remind students that each foreign country has its own laws and standards of acceptable conduct, including dress, manners, morals, drug use and behavior.
- Advise student participants that involvement in any high-risk activities (i.e. drug or alcohol use and abuse, violation of local laws, etc.) would subject them to the associated penalty for violations of the local and international laws of that host country.
- Advise participants that any violation of the acceptable standards of conduct could lead to sanctions consistent with the CSU Student Discipline Policies and Procedures, including, but not limited to suspension or expulsion from the program.
- Review emergency and crisis response plans with the Faculty Leader prior to departure. Review health and safety services at overseas locations. Know how to contact the local law enforcement, 911 equivalent or security offices in the host country. Student participants need to stay in close or regular contact with the Faculty Leader.
- For appropriate Student Conduct refer students to: [http://bulletin.sfsu.edu/policies-procedures/regulations-procedures/student-conduct/](http://bulletin.sfsu.edu/policies-procedures/regulations-procedures/student-conduct/) and [http://conduct.sfsu.edu/standards](http://conduct.sfsu.edu/standards)
- Review level of strenuous physical activity involved, high-risk activities. Discuss any special medical needs with individual students.
- Provide tips regarding packing and using mobile, light luggage. Caution students to be extremely watchful of their cameras, handbags, etc.
- Discuss airport conduct. Keep your luggage with you at all times. Once you have checked in, make sure no one gets near your luggage. Report any unattended baggage immediately. Do not agree to watch someone else’s bags, no matter how innocent the request may sound. Once you are packed, and especially at the airport, accept no gifts to be taken along from anyone, no matter how well you think you know them.
Upon arrival at destination, do not answer any questions a stranger might ask about the program or its housing. Your reply to any question about your presence is that you are “just visiting.”

Provide a copy of Participant List to participants at the Orientation Meeting as well as to your department head and/or college dean, Risk Management and CEL.

Inform students that you will be available at all times in case they need to reach you.

CEL will give a brief Health & Safety presentation and distribute related materials to students as required. Included will be to remind participants to carry sufficient personal medication supplies with physician documentation, eyeglass prescription, etc. All students must be present for the Health and Safety talk; a separate talk must be given to any student who was not present.

OIP will document the time, location and attendance of the Health & Safety orientation meeting.

Participants declare roommate at Orientation Meeting (if necessary for double room assignments).

If students are traveling alone to destination, advise them how to get to the hotel from airport or train station, approximate taxi fare, tipping, etc.

Provide training on any equipment to be used on the program.

Advise participants to avoid any known high-risk crime areas of the host country.

Provide a brief list of campus regulations and procedures to students. This includes: student conduct, what you need to know about drugs and alcohol at SF State, etc.: [http://bulletin.sfsu.edu/policies-procedures/regulations-procedures/student-conduct/](http://bulletin.sfsu.edu/policies-procedures/regulations-procedures/student-conduct/) and [http://conduct.sfsu.edu/standards](http://conduct.sfsu.edu/standards)

Inform students that if you are involved in a major crisis or emergency while abroad to call loved ones and University officials (Risk Management & CEL) to let them know your status.

The Faculty Leader will also plan and organize an on-site orientation upon arrival in the host country (see below).

If there is a legitimate reason for someone not to attend the mandatory Pre-Departure Student Orientation Meeting, the Faculty Leader will contact the student by phone or email to arrange for the student to attend a make-up orientation meeting in order to cover the essential Orientation topics.

On-Site Orientation at Destination Country (Mandatory)

Topics Should Include:

- Remind participants of safety precautions with money, purses, and cameras and of staying in a group while site-seeing.
- Remind students to inform you in advance if they will be absent from a particular event.
- Remind students to turn in their room key and pay personal bills before leaving hotels.
- Clarify tipping practices or expectations.
- Clarify the policy on baggage handling when moving from hotel to bus.
- Review student conduct and remind participants what is expected of them.
- Remind students of the deadline to submit petition to Audit.
- Review again the emergency and crisis response plans with the Faculty Leader. Review health and safety services at destination country. Review how to contact the local law enforcement, 911 equivalent or security offices in the host country. Remind student to stay in close or regular contact with the Faculty Leader.
Proceed with the short, pre-arranged city tour either by bus or walking.

Faculty-Led Study Abroad Program  
College of extended Learning  
Mandatory Foreign Travel Insurance

Enterprise Risk Management works with the CSU’s insurance program administrator to obtain comprehensive foreign travel insurance coverage through the CSU’s mandatory Foreign Travel Insurance Program (FTIP). FTIP provides coverage for costs arising out of illness or injury while traveling internationally, for costs resulting in some emergency trip interruption or cancellation and for emergency evacuation. Coverage includes, but is not limited to, emergency medical care, medical evacuation, legal assistance, lost luggage, and passport replacement. Worldwide assistance is available 24-hours a day.

Every SF State administrator, faculty, staff, and student traveling to a foreign country on University related business, including academic instruction, is required to obtain the CSU’s foreign travel insurance through Enterprise Risk Management. The CSU’s foreign travel insurance provides coverage for activities that include, but is not limited to, academic coursework, field research, attendance to professional conferences and meetings, teaching, and other University related work and activities.

International travel approval is required and obtained by completing the Fiscal Affairs form, **Request for Authorization to Travel/Travel Advance form**. This completed form, together with the completed **Request for Foreign Travel Insurance packet** is submitted to Enterprise Risk Management in ADM 260 for foreign travel insurance processing and University approval. If appropriate travel approval is not obtained or foreign travel insurance not purchased, international travel is considered unauthorized and the University will not reimburse travel expenses.

Check with Enterprise Risk Management when travel is to countries designated by the CSU Office of the Chancellor as **high-hazard countries**. SF State President approval is required for trips to high-hazard countries, including short-term study-abroad trips. If travel is to a country designated as a "war-risk" country, the Chancellor must approve. Worldwide coverage is available in most destinations except for countries where trade or economic sanctions are imposed by the laws or regulations of the United States of America.

Non-employee travelers (i.e. students, volunteers, etc.) are required to complete the **Release of Liability packet** and the completed forms are to be kept with the traveler’s department records in compliance with SF State records retention policies.

A summary of the CSU’s foreign travel coverage is available by downloading the **SFSU-FTIP Coverage Summary**.

Questions regarding foreign travel insurance coverage may be directed to Michael Beatty, (415) 338-1124, mbeatty@sfsu.edu
Faculty-Led Study Abroad Program
College of Extended Learning

Developing a Budget & Determining Program Costs

When planning a faculty-led study abroad program, it is critically important to build a realistic budget that reflects all program costs (both fixed and variable) so that students will not be surprised by any additional hidden costs that may be added to the program later. It is also important to make sure that all program/operating costs are covered by revenue (tuition) and that you develop a “Budget Shortfall Plan” detailing how you intend to compensate for any budget shortfall if the program does not meet minimum enrollment requirements. You may want to check with the chair of your department or dean of your college to see if s/he may be willing to pay all or a portion of the budget shortfall. In addition, you may want to identify some of the program components (costs) that you feel you may be able to cut or reduce in lieu of canceling the program (i.e. items that do not affect the academic quality of the program).

The list below is only an example designed to help you plan for some of the many student-related expenses you may encounter when developing a budget for your program. You may have already designed parts of your program that negate some of the suggestions listed here (for example, you may have already determined that you will not need traditional classroom space, guest lectures, etc.). While there are many categories listed here, your actual program may contain only some of these elements or may require other areas to be included. Please note that as faculty leader, if you decide to receive your salary and/or reimbursement for your travel-related expenses, revenue (tuition) will need to cover any and all costs associated with your program. Revenue (tuition) will need to cover any costs associated with your program.

Finally, prior to submitting your final proposal to CEL, please work with the College of Extended Learning to develop a “Course Budget Worksheet” for your program breaking down all revenue (tuition), expenses (faculty salaries/wages, operating costs, direct costs, operating expenses, determine administrative fees/overhead, etc., estimate the minimum number of students required for your course, determine the per unit tuition for your specific course (based upon your expected program expenses and enrollment), calculate a revenue surplus/deficit for your program, etc. If you plan to run your program through State-Support, please be sure to meet with your department chair and college dean to review your budget and to discuss plans/best practices regarding any potential budget shortfall.

Please also remember that your proposed budget will also need to include the following indirect costs/fees listed below:

- Campus Administrative Fee: 5%
- Chancellor’s Office Overhead: 2%
- State Prorate Charges: 3%
- CEL Administrative Overhead: 28%
<table>
<thead>
<tr>
<th>Variable (per student) Expenses Per Student Total Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>SF State Tuition</strong></td>
</tr>
<tr>
<td>Program provider tuition</td>
</tr>
<tr>
<td>Student meals</td>
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<tr>
<td>Student meals</td>
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<tr>
<td>Student transportation (air)</td>
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<tr>
<td>Student Travel (ground/in-country)</td>
</tr>
<tr>
<td>Student travel insurance</td>
</tr>
<tr>
<td>Student accommodations</td>
</tr>
<tr>
<td>Books &amp; materials</td>
</tr>
<tr>
<td>Visits/Excursions/Cultural Visits</td>
</tr>
<tr>
<td>Entrance fees</td>
</tr>
<tr>
<td>Visas</td>
</tr>
<tr>
<td>Foreign transaction/currency exchange fees</td>
</tr>
<tr>
<td>On-site orientation</td>
</tr>
<tr>
<td>Misc. program supplies</td>
</tr>
<tr>
<td>Facilities (classroom or meeting space)</td>
</tr>
<tr>
<td>Internet access</td>
</tr>
<tr>
<td>Guest lectures/Supplemental instruction</td>
</tr>
<tr>
<td>Guides</td>
</tr>
<tr>
<td>Airport pick-up</td>
</tr>
<tr>
<td>Tips</td>
</tr>
<tr>
<td>Contingency fee?</td>
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<tr>
<td><strong>Total Course Expenses</strong></td>
</tr>
<tr>
<td><strong>Program Price</strong></td>
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</tbody>
</table>
Creating a Successful Pre-Departure & On-Site Orientation Program

Short-term study abroad programs do not afford students the luxury of time to understand all that they may need to know about their host country. To enable students to make the most of their time overseas, they need to have as much advance preparation as possible. Of course, much of what students may learn in a pre-departure orientation meeting will not mean much to them until they are on-site. But if you, as faculty leader, have provided sufficient academic, logistical and cultural information, it will make sense to them once they have arrived. In addition to the expected benefit of increased student preparedness, solid pre-departure and on-site orientation programs can also help to reduce institutional liability. If it can also be documented that students were advised against certain behaviors, SF State will be in a much better position in any legal situation.

PRE-DEPARTURE ORIENTATION

When planning a pre-departure orientation meeting for your students, please be careful not to assume they have any advance knowledge of the host country, culture or language. They may not have any idea how to go about obtaining a passport; the only visa they may know if a credit card; and some may not know that it is not safe to drink the water in some areas (and yes, that includes ice).

You may want to include the following information in your pre-departure orientation:

Logistical

- **The need for a passport, visas, and other essential documents should be explained.** Explain the process for obtaining a passport. If students already have passports, ask them to check the expiration date. If a visa is required, give students the necessary information about how to obtain one.

- **International travel arrangements should be spelled-out clearly in writing** by the travel agent or other service provider and shared with the students in writing, with extra copies for family & friends. Tell students what time to arrive at the airport and where to meet the group. Talk to them about security measures they are likely to experience in airports.

- **You may want to clearly spell-out in the course description exactly what is and is not included in the program costs** (i.e. housing, homestays, meals, etc.). If there is to be a homestay, students should be given as much information as possible about the host family, including family members’ names and ages, and if available, the address and phone number. You may also want to encourage your students to bring hospitality gifts.

- **Students should be advised about how much additional cash will be required to cover meals not included in the program costs, recommended amounts for personal spending, additional travel, etc.** They should also receive advice on how to carry their funds (i.e. will a credit card work or do they need cash…U.S. dollars or local currency, etc.?).
• **Packing recommendations and airline luggage restrictions:** include a list of suggestions about appropriate clothing to bring, how many formal outfits (if any) should be taken, etc. Encourage the students to pack what they think they need and then walk at least four blocks with their fully loaded suitcase. If they cannot do it, they will need to lighten the load.

• **Phone and email/Internet services abroad:** advise students that access to these services may be more limited than in the U.S. If students buy phone cards, make sure that they know how to use the cards correctly. Students have been surprised to receive large phone bills from hotels despite the fact that they were using a pre-paid phone card. It is fine to visit an Internet café occasionally to touch base with home. But encourage students to spend their limited free time exploring the culture – better to take in one more museum than to spend an afternoon sending emails to friends! Also, students will be very interested in knowing if they will be able to use their cell phones while overseas to send/receive text messages as well as to make phone calls…..not only to each other but also to family and friends in the U.S. Some questions to consider include:

1. Will WiFi be easily accessible in your host city/country? If so, where (only at the hotel, Internet café, Starbucks, etc.)?
2. Should students purchase an international plan with their U.S. cell phone carrier or can they rely on WiFi service?
3. Should they rent a cell phone in your host country (perhaps at the airport)? If so, what are the rates they will need to pay?
4. Can they purchase a SIM card at the airport upon arrival in your host country and will that work with their cell phone? What are the costs?
5. Should students bring a laptop computer?
6. Will an iPad/tablet work overseas?

Please note that there are various smart phone apps that students can download that will allow them to make/receive Free text messages/phone calls to other who have also downloaded these same apps to their smart phones (Viber, Line, Whatsapp, Tango, to name a few). And, of course, there is always Skype and FaceBook! Keep in mind that these apps will only work if students have access to either cellular, Wi-Fi, or Internet connection. Encourage your students to do their homework regarding cell phone usage overseas well in advance of their trip!

• **Parental contact:** Advise students NOT to promise to call their parents the minute they arrive at their program site. Airline delays, problems with phone and Internet systems and just plain jetlag can interfere with a student’s well-intentioned plan to phone home. This results in nervous parents and anxious calls to the SF State!

**Academic Policies**

• **As faculty leader, you will want to provide syllabi and class expectations**, a schedule of class meetings (before, during and after travel), and any on-site activities.

• **Grading and assessment policy:** like any course, expectations must be spelled-out clearly.

• **Policy to add/drop courses** after the program has begun (i.e. if a student wishes to withdraw from the course after the program has begun, what are the academic and financial penalties?).
• **Academic policies about plagiarism and disciplinary procedures** should be clearly articulated.

**Health, Safety & Legal Issues**

Although the Office of International Programs (OIP) will provide you and your students with a general “Health & Safety” orientation, you may want to also discuss the following issues of concern with your students as part of your pre-departure orientation meeting:

• **Inoculations** (if necessary) and requirements for medical examinations before departure.

• Precautions and recommended procedures for **transporting prescriptions** and over-the-counter medicines.

• **Explanation of how medical emergencies will be handled**, and the general availability of medical facilities in the host country.

• **Advice on how to keep oneself healthy** before, during and after travels; include information about “jetlag” and “traveler’s flu.”

• **Caution about depression and eating disorders and other medical conditions**; ask students to be open and honest about sharing medical information with you about such issues.

• **Risks of being sexually active** with other group members or with local people during the program.

• **The policy on alcohol and drug use abroad** should be discussed and should also be distributed separately in writing.

• **Health insurance coverage**: explain that students will need to purchase travel insurance through SFSU.

• **The list of emergency contacts and telephone numbers** can be printed on walled-sized cards to ensure that students always know how to call for help.

• **Explain that students will need register with the U.S. State Department** *(http://www.travel.state.gov)*. The State Department also publishes a number of pamphlets that include both country-specific recommendations as well as general travel advice for Americans traveling overseas.

**Group/Team Building**

• Short-term study abroad programs are very often intense experiences that require group cohesion and cooperation. During your pre-departure orientation meeting, you may want to discuss **issues around “group travel”** and the accompanying stress that this may put on students and their intergroup relationships. **Make sure that students understand that there may be times when the wishes of the individual might be sacrificed for the good of the group.**
• Encourage students to talk openly about their personal reactions, ideas, etc.; discuss differences of opinion among group members fairly and openly. This not only builds trust among students but also provides for great discussions about respect for different opinions, perspectives and viewpoints. As faculty leader, you will want to foster an environment of trust and mutual support.

Country/Culture Awareness

The U.S. State Department (http://www.travel.state.gov) has a wealth of country-specific information on their website that can be used to supplement any materials that may already want to share with your students concerning the people, culture, religion, politics, climate, language, etc. of your host country.

ON-SITE ORIENTATION

• The on-site orientation may be one of the most important moments of your study abroad program. Your orientation meeting will set the tone for the overseas experience your students are about to begin. A good orientation should address the practical issues as well as the cultural challenges the students are about to face. Your meeting makes everything real because the students are now (at last) in the host country and your task is to facilitate their transition to the new environment.

• While planning your on-site orientation, remember that certain practical issues should be addressed. You will, however, want to tailor your orientation to the specific type(s) of student(s) in your class, the length of your program, and the nature of the material being studied. Goals to keep in mind as you plan and prepare your pre-departure orientation meeting may include:

  1. Giving the program a solid beginning;
  2. Providing a strong foundation for your program;
  3. Establishing trust and respect among the students and yourself; and
  4. Preparing and informing the students for the weeks ahead.

• Also, try not to overwhelm your students with too much information at your on-site orientation. You may want to consider dividing your on-site orientation into several meetings over a period of a few days so that your students will have time to focus on the subject at hand. Remember, students will need time to get settled, as well as time to sleep and get over jetlag, before they can absorb information in an appropriate and timely fashion.

You may want to include the following information to our students upon arrival:

Arrival and Survival

• You may want to make arrangements for a group check-in upon arrival at your housing accommodation. This can facilitate tasks such as handing out items such as keys and linens, explaining rules, regulations, curfews, and security. It makes pointing out important facilities
such as kitchens, cafeterias, bathrooms and showers, laundry and Internet access much easier as well.

- Upon arrival and check-in, you may want to provide your students with the following written materials:
  1. Program obligations such as times and places of important first program meetings;
  2. A map of the area where they will be living (with pharmacy, ATM, police station, subway stop, and food shops clearly marked);
  3. Directions to and from the housing site and your various destinations/site visits;
  4. Information on how to call home/Internet use;
  5. Business card from your housing site

- A walking tour of the neighborhood is always useful and appreciated by the students. You may want to point out:
  1. Public transportation stops
  2. ATM machines
  3. Supermarkets
  4. Pharmacy
  5. Police station
  6. Historical sites
  7. Parks

- A walking tour is also a good time to give students a few important safety tips for the host city or country. Keep to basic issues that are easy to remember such as not walking back to your hotel late at night. Keep in mind that your students are generally extremely tired and that your more in-depth safety talk will be at your general orientation meeting the following day.

**General On-Site Orientation Meeting**

- A general on-site orientation meeting should be held with your students as soon after you arrive as possible, although it is better not to schedule it on the actual day of arrival in the host country. Experience has shown that covering important topics on arrival day is ineffective because students are too tired to absorb or learn anything of importance.

Tips on running a successful on-site orientation meeting include the following:

  1. Have a specific agenda of subjects to cover;
  2. Try to be brief yet complete in your explanation of the subjects covered;
  3. If possible, have more than one person present the information, to keep the students engaged;
  4. If available, use visual aids such as slides, posters, a PowerPoint presentation, handouts, etc.
  5. Allow some time for questions and answers after each topic is covered, but keep the meeting moving.

- You may want to consider providing each student with a packet of information and a program calendar. Your orientation packet should include written material about the topics covered at
the orientation for future reference. You may also want to include maps, timely periodicals or articles about the host city or country, any in-house publications you may have, as well as information on local happenings, concerts, exhibits and events occurring during the program’s duration.

Topics that you may want to consider covering at your on-site orientation meeting include:

**Program Calendar**

When reviewing the program calendar with your students, make sure that they understand departure points and times for any excursions for each day of your trip. You may also want to review events for the last day of your program including the group’s departure from your housing accommodations (check-out policies, times, etc.) as well as logistics for transportation to the airport.

**Money & Banking**

During the money and banking segment of your orientation, it may be useful to have some of the local currency on hand for students to refer to while you explain the notes and coins used in your host country. Be sure to explain how and where to change currency in your host city, as well as local banking hours. Assume that most of your students have never traveled abroad before and supply them with reliable and convenient addresses for banks, ATM machines, etc.

When discussing money and banking issues, explain sales tax in the host country as well as local tipping practices. Because student budgets are personal and can vary enormously, it is generally not useful to discuss budgeting at length, though emphasizing that planning ahead will help students' budgets. It may also be a good idea to point out items or services that may be particularly expensive in the host city.

**Communications**

You may want to explain to your students how the telephone system works in your host country. Students will be most interested in using their cell phones to send text messages/make calls, etc. not only to one another but also to family and friends back in the U.S. as well as accessing the Internet from either their phones or from the laptop computer, iPad, etc. You may also want to explain how students can contact their family in the U.S. Review time differences between the U.S. and your host country and provide students with the necessary dialing codes if they plan to call their family and friends in the U.S. Try to identify nearby Internet cafes and other places where students will be able to access email, FaceBook, etc. Finally, please remind students that it is critical that they maintain contact with family and friends throughout their study abroad experience!

**Transportation**

As part of your on-site orientation meeting with your students, you will also want to discuss transportation in your host city/country. Some students may have never taken public transportation before. You may want to plan an activity on your first day or so where students can take public transportation with you the first time. That way their transportation orientation is “live and in person.”

When talking about public transportation, you will want to include a discussion of the subway and bus system in your host city. Includes the hours the system operates and anything pertinent or special to the system that students will need to know. Make sure that each student has a map, and during your
meeting, run through a couple of sample trips to places in town that they may want to visit. Mention areas that are best to avoid in the evenings or parts of the city that are less safe. Be sure to give students the correct vocabulary for purchasing tickets or passes and have current prices available.

You may also wish to talk briefly about using taxis in your host city. Provide students with approximate costs and how best to hail a cab, again always keeping in mind that your students may have never taken a taxi before. Whenever possible, you may want to supply students with a phone number to call a taxi should they need to get home late at night. Make sure that the taxi company you suggest is legitimate and reliable.

Health & Safety

Certainly one of the most crucial parts of your on-site orientation meeting is the discussion of health and safety. It may be useful to provide students with a list of English-speaking doctors they can contact should they become ill (or maintain a list yourself). Information on local hospitals and pharmacies is useful as well. Be sure to explain to your students how health care is paid for in your host country: are students expected to pay first and then be reimbursed by insurance later? Inform them of how much a typical visit to the doctor will cost as well as what method of payment is accepted. Make sure that you have a copy of the travel insurance policy which your students purchased prior to departure, and that you have read it over and understand it as you may at some point during your program be asked to provide an explanation of the policy to a sick student.

Students should also be given the phone number to call for ambulance, police and fire, the host country equivalent of 911 in the U.S.

Staying safe is an ongoing process for your group of students, so you should be available to discuss safety issues at any time during the program. Sometimes the best safety discussions with students may happen in more casual settings and situations, such as during a group meal or during a long train ride. Students need to think about their safety at all times and should be instructed, reminded and encouraged to make good decisions for themselves throughout their time abroad.

During the safety part of your on-site orientation may also be a good time for you to review the rules and regulations of student conduct. This includes discussion of the use of alcohol and drugs. Be familiar with SF State policies as well as the legal drinking age in your host country. When discussing alcohol, be clear about what may be tolerated (i.e. a glass of wine at dinner with their host family) versus what may be considered grounds for expulsion from the program. Remind students that one of the keys to staying safe in a foreign environment is keeping their wits about them in order to recognize anything that doesn’t feel right and to make good decisions. If a student’s thinking is clouded by alcohol or drug use, their chances of making the best choices and decisions are not as good, thereby putting themselves at a higher safety risk.

You may also want to prepare an emergency card to give to each student showing simple steps to take in case of an emergency. Keep it simple and to the point. The card should have emergency contact numbers, including the U.S. embassy/consulate in the host city.

Also, encourage communication with your group. For example, always provide information about how students can contact you when not together as a group, after hours, etc. Ask students to provide you (or another member of the group) with information about their destination as well. Should you need to account for everyone on short notice at least you will have an idea about where the students are and when they are expected back.
It is important that this part of your on-site orientation be taken seriously. You need students to understand the seriousness of what you are discussing as well as the importance of having a “what if” plan of action. But you do not want to cause confusion or panic among your students.

In conclusion, remember that orientation is an ongoing process throughout the entire program. After all of your meetings, both pre and post-arrival, walking tours, and cultural lectures are done, the process continues. For the cultural learning and understanding of the host country to continue, you need to be available throughout the time you are abroad to act as a sounding board, to give students guidance, help or sometimes to just lend a sympathetic ear. The more prepared your students are for their study abroad experience, the better, deeper and more enriching the experience will be for all concerned.

Most recent update: Summer 2019

(This document is based on one developed by Michigan State University and UW-Madison). Overseas Programs and Partnerships, September 1999