



# Study Abroad Faculty-Led Program Handbook

*The Study Abroad Coordinator (SAC) in the Office of International Programs (OIP) would like to recognize the hard work and dedication faculty put into designing, implementing, and coordinating study abroad programs. We recognize that without faculty support and a great deal of energy and commitment, SHSU students would not have the opportunity to gain international experiences while pursuing their academic goals.*

*The following guidelines are meant to assist faculty in planning and implementing successful study abroad programs. OIP is available to help each step of the way, and we genuinely hope to receive continual feedback on these guidelines so that we can continue to make revisions and updates that will assist faculty in their international endeavors.*

*If you have questions, comments, or concerns, please contact Malin Hilmersson, Study Abroad Coordinator at [malin@shsu.edu](mailto:malin@shsu.edu) or 936-294-3276.*



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## SECTION 1: Program Development Overview

### 1.1 OVERVIEW

The following guidelines for faculty-led study abroad programs are based on the Texas Higher Education Coordinating Board (THECB) [Policies for Out-of-Country or Out-of-State Courses](#).

### 1.2 DEFINITION

Faculty-led study abroad programs are academic experiences/programs that are initiated, organized, and carried out by members of SHSU faculty, with assistance from OIP. The THECB defines a course taught abroad or outside of Texas as one offered for academic credit where 51% or more of the instruction takes place outside of Texas. All faculty-led programs offered by SHSU must follow the Texas Higher Education Coordinating Board's and SHSU's policies and procedures.

Short-term programs may range in length from ten days to a month-long experience. The primary purpose of creating a study abroad program may range from cultural immersion purposes (language, cultural, social, etc.), to academic content related to a geographic area, to natural environment studies (biology, geography, etc.).

### 1.3 GENERAL PROCEDURES

Developing a study abroad program requires much thought and preparation. This document is designed to provide faculty with all the required information, including deadlines, questions, and forms. A faculty-led study abroad program proposal should carry the endorsement of the appropriate department and college. Depending upon the proposed length and complexity of the program, a lead time of 12-18 months prior to the commencement of a program may be needed. Faculty leaders have the primary responsibility for the academic content and instructional delivery methods of study abroad programs. The faculty will also be responsible for the on-site arrangements for the program and the Study Abroad Coordinator will provide the pre-departure orientation. Faculty should gain approval for the initial program through their Department Chair and Dean before submitting the proposal to the Study Abroad Coordinator. By submitting a proposal for a faculty-led program, the faculty leader agrees to abide by all system and university policies enumerated in the Sam Houston State University Study Abroad Policy.

### 1.4 APPROVAL PROCESS

All study abroad program proposals need to be reviewed and approved by the following departments and committees:

1. Department Chair

2. College Dean
3. Office of International Programs
4. Office of Academic Planning and Assessment
5. Academic Affairs
6. Texas State University System Board of Regents (TSUSBR)

## 1.5 PROPOSAL COMPONENTS

1. Program Proposal (*See Appendix*)
2. Syllabi of courses to be offered
3. Program itinerary
4. Supporting documentation including contracts and/or publications on physical facilities including housing, institutional affiliation, classroom space, study space, travel agency etc.
5. Estimated budget

## SECTION 2: Guidelines for Program Development

### 2.1 GENERAL RESPONSIBILITIES

- 2.1.1 Academic Departments** have the primary responsibility for the academic content, instructional delivery methods of study abroad, pre-departure orientation (with the exception of safety and security pre-departure orientations) and onsite arrangements for the program.
- 2.1.2 Office of International Programs** will work with academic departments:
- To assist in the development of a program to ensure compliance with university policies, train faculty on best practices in study abroad, and health and safety requirements.
  - To assist in setting up accounts and budgets for the trip.
  - In conjunction with the Cashier's Office, place charges and, if necessary, remove charges on student accounts based on a pre-determined payment schedule set by faculty and OIP.
  - To coordinate with faculty and the Registrar's Office to confirm registration status.
  - To assist with marketing through hosting a Study Abroad Fair, information sessions, Saturday at Sam, and posting trip information on the OIP website.
  - To provide pre-departure health and safety orientations for participating students.
  - To provide scholarship information to eligible students.
  - To maintain centralized records of all faculty-led study abroad programs and participants.

### 2.2 TIMELINES

The following timelines are meant to prepare faculty well in advance for the proposal submission requirements and to help them plan accordingly. Note that specific dates will change from year to year, but the general timeline will remain the same. The timelines begin the YEAR BEFORE the program will be held.

#### **ALL PROGRAMS (PROGRAM PROPOSAL SUBMISSIONS):**

All program proposals for the calendar year must be submitted according to the following timeline:

- ❖ **May:** Begin compiling budget and other materials for submission.
- ❖ **Early July:** Submit program proposal to Department Chair and College Dean for approvals (*See Section 1.4*).
- ❖ **August 1:** Faculty Leader submits program proposal to OIP.



- ❖ **Mid-August/September:** Make adjustments to proposal requested by OIP and Academic Affairs.
- ❖ **Mid-August/September:** Begin marketing proposed course(s) to students. OIP will also host a Study Abroad Fair, information sessions, and will attend Saturday at Sam to assist in marketing.
- ❖ **Mid-August/September:** Submit New Fund Request (if necessary) so trip account can be set up.
- ❖ **Late November:** Receive notification from THECB (through OIP) as to whether courses have been approved.

### **SUMMER PROGRAMS (REMAINDER OF PROGRAM PREPARATION):**

For summer (including mini session programs), faculty should adhere to the above timeline for proposal submission and the following dates:

- ❖ **End of November-January:** Deposit payments are due and become non-refundable (*see Student Financial Responsibility Agreement in student application packet*).
- ❖ **January:** Submit courses to Registrar to be built (*See Section 2.12*).
- ❖ **Mid-January-May:** Financial penalties begin to take effect against student withdrawals (*see Student Financial Responsibility Agreement in student application packet*).
- ❖ **February/March:** OIP will host information sessions to help recruit students. Also, fill out a travel requisition along with initial list of students and pre-payments to vendors (if necessary) to Disbursement & Travel Services.
- ❖ **Early May:** All program fees must be paid in full (*see Student Financial Responsibility Agreement in student application packet*).
- ❖ **30 Days After Trip Completion:** Make final payments to vendors, if necessary. Also turn in the Expense Report (Faculty Travel Expenses) to the Disbursement & Travel Services. Upon completion of the program, faculty leaders must account for all purchases made against a travel advance and submit.
  - ❖ **By August 30:** Submit Cost Report Form to OIP (*provided by OIP*).

### **WINTER BREAK PROGRAMS (REMAINDER OF PROGRAM PREPARATION):**

Winter Break programs should be reported as the last program of the calendar year. Thus, a planning time of 1 ½ years is required in order to comply with the program submission timeline above.

- ❖ **February:** Begin marketing proposed course(s) to students. OIP will host information sessions and attend Saturday at Sam to help market the courses.
- ❖ **August:** Fill out a travel requisition along with initial list of students and pre-payments to vendors (if necessary) to Disbursement & Travel Services.
- ❖ **September:** Financial penalties begin to take effect against student withdrawals (*see Student Financial Responsibility Agreement in student application packet*).
- ❖ **Mid-November:** All program fees must be paid in full (*see Student Financial Responsibility Agreement in student application packet*).



- ❖ **30 Days After Trip Completion:** Make final payments to vendors, if necessary. Also turn in the Expense Report (Faculty Travel Expenses) to the Disbursement & Travel Services. Upon completion of the program, faculty leaders must account for all purchases made against a travel advance and submit. Also, submit Cost Report Form to OIP (*provided by OIP*).

## 2.3 PROGRAM REQUIREMENTS

### 2.3.1 Dates of Travel

The dates of the program must line up as closely as possible with the existing semester dates (ex: a trip leaving in May should be classified as a mini-semester course, NOT a Summer I course). The program dates should not crossover into an exciting semester. Few exceptions are made.

### 2.3.2 Credit and Contact Hours

15 contact hours must be offered per credit hour. A 3-credit course must offer a minimum of 45 contact hours. If two courses are offered on the program then 90 contact hours must be built into the program, 45 contact hours per course. No double-dipping.

Students may not earn more than 1 semester credit hour per week, a minimum of 15 contact hours per week over the course of the program, excluding travel dates. Contact hours are calculated using the following equation for a 3 SCH course: 45 Total Contact Hours = a minimum of 9 days over a 3-week period. No maximum nor minimum contact hours per day is established. **Note:** All requirements for three-credit-hour courses are applied proportionally to courses for one, two, four, or other credit hour values.

### 2.3.3 Course Selection

It's important to carefully select the course(s) that will be proposed and consider the student that will be able to enroll in the program. Established course pre-requisites in the course catalog cannot be overwritten for faculty-led courses. Course(s) selected must be in the current SHSU Course Inventory and course(s) cannot be currently in the curriculum review/approval process. Course cannot be offered in online mode of delivery.

Courses such as Independent Study and Practicum can not be used for faculty-led programs. Special topics courses can be used.

### 2.3.4 Team Taught Courses

Team teaching of study abroad courses require the Provost's approval and will result in the two instructors splitting the teaching load. No more than two instructors can be assigned to one course.





### 2.3.5 Location

The location where the course is taught must be relevant to the coursework and enriching to the students' experience and understanding of the content. According to TSUS policies locations under Department of State Advisory Level 3-4 will not be approved.

## 2.4 PROGRAM PROPOSAL APPROVAL

Faculty who wish to develop a study abroad program will work with OIP as they develop the course and fill out the program proposal form (*see Appendix*). The faculty leader, department chair and dean will sign the proposal form before submitting to the Study Abroad Coordinator. The deadline is August 1<sup>st</sup> for summer and winter-break programs (i.e. summer 2022 and winter-break 2022 programs). Please note that according to THECB Guidelines, in order for a study abroad program to make, a minimum of 10 undergraduate students (or 5 graduate students) PER COURSE must be enrolled.

During the program proposal process, OIP together with Academic Affairs will review proposals to ensure compliance with SHSU and THECB study abroad policies and guidelines. Risk management related issues will also be reviewed. If needed, OIP will work with the faculty member to make recommend changes to be consistent with SHSU and THECB policies and guidelines. With the help of the Study Abroad Coordinator, Academic Affairs will then send the list of proposed courses to the Board of Regents for final approval at the November meeting.

PLEASE NOTE: Once courses are submitted to the Board of Regents for approval, **no changes can be made**; the approval is specific to course titles and numbers, lead instructor, dates, location, credit hours, and length.

## 2.5 NEW FUND REQUEST & BUDGET REQUEST

In order to give faculty the ability to make program reservations and payments prior to all the student money being collected, SHSU can provide a specific fund (FOP) and budget for the individual trips. In order to get the FOP set up and the budget approved, the following steps should be followed.

### 2.5.1 New Fund Request (NEW Programs Only)

Complete the New Fund Request form (*provided by SAC*). Faculty will need their academic department's org #. The Fund # starts with a 157 to indicate study abroad. The program # is 10. The department chair, dean and Provost will sign before submitting it to the Controller's Office.

### 2.5.2 Budget Request Form

1. Submit Faculty Budget Request Form (*provided by SAC*)
2. Once the Study Abroad Coordinator receives the Budget Request Form after the appropriate signatures (faculty leader, department

chair & dean), it will be forwarded to the Provost, the Budget Office, the Vice President of Finance (if over \$50,000) and President (if over \$100,000) for approval.

## 2.6 COLLECTING STUDENT PAYMENTS

To relieve the faculty member from the rigors of collecting student money, all student payments should be made to the Cashier's Office. Charges will be placed on student accounts based on the published program costs. All students must sign the Financial Responsibility Agreement as part of the program application prior to any charges being added. This agreement serves to notify students when deposits and payments are due and when certain percentages of payments are nonrefundable. The Study Abroad Coordinator will send faculty updates on students who have and have not paid. Please also let the Coordinator know if a student needs to have a charge removed.

## 2.7 STUDY ABROAD SCHOLARSHIPS

OIP offers merit-based study abroad scholarships that come from student fees. Due to limited funds, there is no set amount as to how much each student will receive. The International Programs Activities Committee will meet after each scholarship application deadline to determine scholarship amounts for eligible student applicants.

### 2.7.1 Student Requirements

To be eligible for the scholarship, undergraduate students must have at least a 3.0 SHSU GPA and graduates at least a 3.5 SHSU GPA, be participating in an authorized study abroad program, and be receiving academic credit for that program. Students should fill out the scholarship application in the Bearkats Abroad Portal (Via TRM) and attach their unofficial transcript by the application deadlines.

### 2.7.2 Application Deadlines

September 1 for winter-break programs  
November 1 for priority consideration for summer programs  
February 1 for summer programs

The OIP scholarship application, along with a listing of non-SHSU study abroad scholarships, are on the OIP website:

<http://www.shsu.edu/dept/international-programs/scholarships/index.html>

### 2.7.3 Scholarship Disbursement

Scholarships cannot be disbursed until students turn in the Scholarship Award Response form along with proof of registration in the course(s), indicating that they accept the scholarship.

As indicated on the scholarship application, scholarships will not be disbursed until right before/during the trip. Students will receive an email from the Financial Aid & Scholarships Office letting them know it is time to accept the scholarship through MySam.

If a student has been awarded the scholarship and withdraws from the study abroad program the scholarship award will be rescinded.

## 2.8 MAKING PAYMENTS TO PROGRAM VENDORS

Prior to any purchases being made, a travel pre-approval for each traveling faculty member must be created and approved for the Disbursements and Travel Services Office (*see section 2.9*). Pre-payments for group expenses are encouraged.

### 2.8.1 In-Country Travel and Accommodation Purchases

Direct Pay is the preferred method for making purchases related to faculty-led study abroad trips. Once the trip's FOP account has been set up and funds have been moved from the revenue account (560000) to the travel account (710000), then purchases can begin being made. Departments are responsible for ensuring that the funds have been moved to the appropriate account before requesting payments to be made.

### 2.8.2 Bids

Bids are not required when paying through Direct Pay, but supporting documentation is required stating why the specific service provider is being used.

### 2.8.3 Vendor Setup

Vendors must be set up with the Disbursement & Travel Services Office before payments can be made and a Vendor ID can be created. Foreign entities that do not already have a Federal tax ID must call 1-267-941-1099 to set one up. For new trips, faculty ensures vendors are setup through PaymentWorks.

Examples of vendors that faculty have used: ARAMFO, EF Tours, Millennium Tours, Serendipity Sustainable Adventures, STA Travel, Student Universe, UNIBE.

### 2.8.4 Method of Payment

Direct Payments can be made either through a Wire Transfer, or through the issuance of a check. If a wire transfer is requested and the charge is submitted in a foreign currency, a currency conversion must be included in the submission.

To request a payment be made, submit the Direct Pay Form or Outgoing Wire Form along with a detailed invoice through BearKatBuy.

## 2.9 TRAVEL PRE-APPROVAL

A travel pre-approval must be created and approved for each SHSU faculty member accompanying the student group for the Disbursement & Travel Services Office. All travelers are required by our Board of Regents to complete the Liability Waiver (*provided by OIP*). Student liability waivers need to be attached to the lead faculty member's pre-approval. Also attached to the lead faculty member's pre-approval is a list of participants, the class roster (as soon as available), and an emergency contact list/forms for all travelers.

### 2.9.1 Accompanying Family Members

All accompanying family members must complete and submit the Accompanying Family form (*contact OIP for form*). It contains guidelines on required forms and policies. All expenses for family members must be paid for separately. Student program fees may not be used to fund any trip-related family member expenses. Each accompanying family member must also fill out the Liability Waiver. Family members of faculty leaders may NOT be hired to perform duties on the study abroad program. Faculty spouses can however serve as co-leaders of a program if each is teaching a course for the program.

## 2.10 TRAVEL ADVANCE

A travel advance may be requested and issued to the lead SHSU faculty member once the travel pre-approval is approved by the Disbursement & Travel Services office.

### 2.10.1 Requesting a Travel Advance

To request the advance, Disbursement & Travel Services requires the Travel Advance Agreement/Check Request forms (*contact Travel*). The advance may not exceed the estimated dollar amount on the approved travel requisition. The employee can request up to 100% of the estimated travel expense.

### 2.10.2 Timing of Issuing a Travel Advance

The travel advance will not be issued more than 10 working days prior to the trip (unless justification is included on the Travel Advance Check Request).

### 2.10.3 Form of Disbursement

All advances will be disbursed via direct deposit or paper check, depending on method preferred. It is encouraged to sign up for direct deposit for employee reimbursements.



#### 2.10.4 **Keeping Receipts & Accountability Form for Meal Expenses**

All expenses used with advance funds must be accounted for by either receipts or the Accountability Form. If the faculty member pays for a group or individual meal, a record of recipients needs to be submitted with the meal receipt. A receipt for any excursion(s) paid for on site is required to be attached to the travel expense voucher with explanation of who attended and where/what the expense relates to the academic purpose. Allowed meal and lodging rates are to be obtained at [www.gsa.gov](http://www.gsa.gov).

The Accountability Form is applicable for meal expenses only and a record must be kept for each student regarding the daily total dollar amount. Students must sign the Accountability Form upon receipt of funds and be aware that all unused funds must be returned to the lead faculty, whom will be held responsible to return remaining funds to SHSU.

### 2.11 TRAVEL REIMBURSEMENT

Study abroad expenses incurred while in travel status should follow all SHSU Travel policies, which are posted on the university website. Reimbursement for expenses can only be submitted for the SHSU faculty and the students who have paid for the trip.

#### 2.11.1 **Additional Expenses While In-Country**

The Disbursement & Travel Services Office understands that additional expenses arise as a necessity and fall outside of the normal travel expense when traveling abroad. In the event this happens, please include an approved explanation of the expense(s) and how the expense(s) is related to the academic purpose of the trip.

#### 2.11.2 **Foreign Currency Conversion**

When requesting reimbursement or accounting for advanced funds, all expenses incurred in foreign currency or exchanges of currency must be converted to U.S. dollars. The calculation methodology using an approved foreign currency conversion must be documented. Travelers may utilize the following options:

- **On-site Exchange Rate:** If the traveler converts U.S. dollars to a foreign currency while overseas, the traveler should receive a receipt showing the actual exchange rate. This single rate may be used only for the individual transaction and may not be used for other transactions during the trip. Additional fees charged by the foreign currency exchange vendor may be reimbursed, if included on the receipt, itemized, and explained
- **Credit Card Rate:** If the traveler's expenses are on a credit or debit card, the credit/debit card statement can provide the currency exchange rate on the detailed transaction report from the card issuer. This report can be submitted as proof of payment and currency conversion.

Additional fees charged by the card issuer for foreign currency transactions may be reimbursed, if itemized and explained on the statement.

**2.11.2.1** Credit Card Rate is the suggested method of reporting daily exchange rate as it is much less burdensome for Faculty than the method below. Please note, however, that due to the nature of international travel, it may not always be possible to pay on-site expenses by credit card.

- Online Rate: The traveler may use <http://www.OANDA.com> for historical currency exchange as a standard conversion rate. The OANDA website provides an average exchange rate for exact dates of travel that will need to be customized for accuracy.

### **2.11.3 Expenses NOT Reimbursable**

- Alcoholic beverages
- Gifts
- Early Check In
- Excess baggage charges for personal belongings
- Flight insurance – personal
- Laundry or cleaning
- Tips and gratuities for services rendered
- Expenses not related to official State business
- Personal entertainment
- Losses caused by exchange rate fluctuation
- Expenses incurred on behalf of another university employee

### **2.11.4 Expenses Reimbursable That Require Receipts**

- Transportation by airline, railroad, rental car, taxi or limo
- Lodging
- Parking and tolls
- Registration fees
- Fuel for rental cars
- Miscellaneous expenses (i.e., long distance business calls, excess baggage fees)

## **2.12 COURSE BUILDING AND SUBMISSION**

Departments should submit study abroad courses to the Registrar's Office in the same manner as regular on-campus courses. This can be done at the departmental level using the Class Schedule Maintenance Form.

### 2.12.1 Submission Deadlines

Summer courses can be submitted as early as January and as late as March.

### 2.12.2 Special Instructions

Since faculty-led courses will not typically require classroom space, they should be built with a special designation in order to be properly identified and coded for fee removal. If courses are going to meet prior to or after the trip and need classroom space, it must be reserved on the main campus and arranged as a normal on-campus class. Please note that this means that students will pay all the normal fees associated with on-campus classes (*see Section 2.14 for specific fees*).

The following designations should be used when building courses that will NOT be meeting on campus during the regular term:

- **Campus Designation:** C (out-of-country)
- **Building:** OC (off-campus)
- **SSATEXT:** State the country where the program will take place.  
Ex: Spain Study Abroad

### 2.12.3 Registration Restrictions

So as to assist faculty leaders in managing the enrollment in their course(s), it is recommended that departments build the courses with departmental restrictions preventing open registration into the courses. Prior to early registration, the Study Abroad Coordinator will work with the Registrar's Office to manually override the registration restrictions for the students who have been accepted into the study abroad program by the faculty leader and have paid their program fees according to the designated payment schedule.

## 2.13 STUDENT REGISTRATION

Due to the nature of faculty-led study abroad courses, special procedures for student registration and withdrawal have been put into place to help protect the integrity of the program and ensure the faculty leader is allowed the maximum control over the student registration for their course(s). Please note that according to THECB Guidelines, in order for a study abroad program to make, a minimum of 10 undergraduate students (or 5 graduate students) PER COURSE must be enrolled.

### 2.13.1 Registration Process

Students will be responsible for registering for the appropriate courses through MySam.



### **2.13.2 Auditing Courses**

Students are not allowed to audit out-of-country courses.

### **2.13.3 Participants Not Earning Academic Credit**

In general, faculty leaders should not open their programs to anyone that will not earn academic credit for the program. Participation of individuals not earning academic credit can negatively lend to a perception of the program as serving a primarily leisurely function. The Higher Education Coordinating Board of Texas and SHSU Academic Policy emphasize that a program must clearly serve academic, non-recreational purposes. However, if this option is desired, please notify the Study Abroad Coordinator as soon as possible. If they are deemed eligible for participation, the process by which they are approved and extent to which they are supported with state resources is subject to further review.

### **2.13.4 Dropping a Course**

In order to protect the faculty leader's authority and the integrity of the program, students will be required to attain faculty permission to withdraw from the course once they are abroad.

## **2.14 TUITION AND FEES**

Faculty-led study abroad courses that are designated as out-of-country are considered regular SHSU courses and are subject to the normal tuition and fees with the exception of the service fees listed here: Recreation Fee, Lowman Student Center Fee, and Health Center Fee = \$275.

NOTE: Since these fees are not charged for *each* class, but only once per semester, if a student is taking another course on campus during the same semester as the study abroad course, they *will* be required to pay the fees.

### **2.14.1 \$200 Study Abroad Service Fee**

OIP provides significant support to the faculty and students who participate in faculty-led programs. In order to provide the personnel necessary to support these programs, each student participating in a study abroad program will be assessed a \$200 fee. This fee is not included in the program cost of the trip; it is a separate fee. Please inform students of this fee.

## **2.15 REFUNDING PROGRAM FEES**

At times, it may be necessary to refund students, either due to withdrawal from the program, program cancellation prior to departure, or emergency cancellation of the program once abroad.



### 2.15.1 Program Cancellation Prior to Departure

The Provost has the ultimate authority to determine whether a program will be allowed to proceed without minimum student enrollment (10 students per undergraduate class or 5 per graduate class).

Should the program be cancelled prior to departure due to low enrollment or other causes, students will be refunded 100% of their program fees. The Study Abroad Coordinator will collaborate with faculty leaders and the Cashier's Office to process the refunds.

### 2.15.2 Student Withdrawal

Students who withdraw from the program prior to departure may be held accountable for some or all charges, based on the Student Financial Responsibility Agreement (*from the student application packet*).

**2.15.2.1** Note that a withdrawn student should not be charged more than they are actually committed to. For example, if the withdrawal policy states a student owes \$1,000, but the student is only committed to \$500, the student should be charged \$500. This is to remain in compliance with the directive that study abroad programs cannot profit from the collection of student fees. Additionally, if there is a surplus of **withdrawal fees** after program completion, any remainder should be refunded to the **withdrawn student only**. Under no circumstances, can surplus withdrawal fees be refunded to students that participated, just as participating student fees cannot be used to fund another student's withdrawal. Withdrawn student fees cannot be used to benefit participating students.

### 2.15.3 Program Cancellation Once Abroad

If the faculty leader, Chair, or Dean determines that a program should be cancelled or terminated due to an emergency or crisis situation, the process for notification and refunds will be determined by the Department. University Marketing and Communications will be notified so that all university communications will be consistent.

### 2.15.4 Student Withdrawal Once Abroad

Students who wish to withdraw from the program after departure, or who are expelled from the program for any reason will not be refunded any of the program fees, unless there are extenuating circumstances and the faculty leader and Department agree to the refund. Tuition and fees will be refunded according to the terms outlined in the Student Financial Responsibility Agreement (*from the student application packet*).

## 2.16 CANCELLATION OR TERMINATION OF PROGRAMS

Occasionally programs must be cancelled prior to departure or terminated prior to completion, but after the students are already abroad. In order to protect the students' monetary investment and the faculty leader's time investment, a cancellation policy should be specified in the published brochure/website and discussed during the pre-departure orientation session(s).

If the program is cancelled prior to departure, the Disbursement & Travel Services Office should be notified, and a request to release the budget should be made.

### **2.16.1 Emergency Cancellation or Termination of Programs**

If the faculty leader, Chair, or Dean determines that a program should be cancelled or terminated due to an emergency or crisis situation, the process for notification should be determined by the Department. The University Marketing and Communications should be notified so that all university communications will be consistent.

## **2.17 PROGRAM CLOSE-OUT**

Upon completion of faculty-led programs, the following procedures should be completed within **30 days** of the program completion date:

### **2.17.1 Expense Report (Faculty Travel Expenses)**

Upon completion of the program, faculty leaders must account for all purchases made against a travel advance and submit the report to Disbursement & Travel Services.

### **2.17.2 Remaining Fund Balances**

If, upon completion of the program, after all outstanding balances to vendors have been paid, there is a remaining fund balance, the following procedure will occur:

1. For amounts over \$10 per student on the program, all remaining funds will be refunded to students who have completed the program and received a passing grade in the course(s). OIP will work with the Cashier's Office to refund students.
2. For amounts under \$10 (\$9.99 and less) per student, the fund balance will be transferred into a Study Abroad Administrative fund.
3. The Study Abroad Administrative fund, after reaching a balance of \$5,000, can be used under the discretion of the OIP Director, in conjunction with the sponsoring department head, to cover programs ending in a negative balance up to \$1,000. Program funds with a negative balance over \$1,000 will be the responsibility of the sponsoring department.

### **2.17.3 Cost Report Form for Annual Report**



Complete the Cost Report form (*provided by SAC*) and submit to the Study Abroad Coordinator no later than August 30 (summer trips) or 30 days upon completion of the program.



## SECTION 3: Program Components

### 3.1 PROGRAM CONTENT

All faculty-led study abroad programs are subject to the same standards and university policies and procedures as any other academic program except where otherwise stipulated by this document.

### 3.2 SUGGESTED LEARNING OUTCOMES

All study abroad programs should address one or more international-based learning outcomes in addition to the specific discipline-related learning outcomes of the program. Examples of **suggested** learning outcomes are listed below:

#### **3.2.1 Knowledge**

Study abroad participants will seek to understand the host culture in a global and comparative context; that their culture is one of many diverse cultures and that alternate perceptions and behavior may be based in cultural differences; how historical and current forces shape world systems; other languages and cultures (beliefs, values, perspectives, practices, and products); or how the natural environment of the country is contextually important to the program.

#### **3.2.2 Skills**

When appropriate, study abroad participants will analyze issues, situations, or the natural environment from more than one cultural perspective and have opportunities to speak, listen, read, and/or write in a language other than their first language.

#### **3.2.3 Cultural Perspective**

SHSU study abroad participants should seek to learn from others who are culturally different from themselves; accept cultural differences and accept cultural differences and ambiguities; appreciate the language, art, religion, philosophy, material culture, or utilization of the natural environment of different peoples.

#### **3.2.4 Additional Suggestions for Learning Outcomes**

- A substantial portion of the academic program should be related to the socio-cultural or geographic environment of the host country.
- Class-hour credit may be awarded for extra-curricular lectures and field trips when the content is academic in nature and integrated into the class for which the credit is awarded.
- Where possible, opportunities for cultural immersion should be incorporated into the program, e.g. service learning, internships, host

families, interaction with students from the host country, discovery of the natural environment, etc.

- When feasible, programs in non-English speaking countries should seek to incorporate a language development component.
- The program should include opportunities for reflection on the experience abroad during and after the experience.

### 3.3 PRE-DEPARTURE ORIENTATION

All students participating in a study-abroad program will attend a mandatory orientation session(s) prior to departure. The Study Abroad Coordinator will work with faculty leaders to develop these sessions and will provide assistance and information as needed. The session(s) should provide information about:

- Health and safety issues
- Behavior expectations
- Accommodations
- Adjustment to the host culture
- Information about the host location and society
- U. S. State Department Travel Warnings or Advisories
- CDC Health Information for the country
- Emergency Contact Numbers for program directors and university officials
- Procedures for a medical emergency

### 3.4 ON-SITE ORIENTATION

The program must also provide students with a continuous on-site "orientation" to the host culture by providing them with information about the host location and culture in order to maximize their experience and learning.

### 3.5 STUDENT ASSESSMENT

Student learning outcomes and overall student experience should be assessed at the program's conclusion. Feedback will be used to improve subsequent programs and to continually improve pre-departure orientation sessions.

#### **3.5.2 Post-Program Evaluation**

Students will be provided information while they are abroad regarding the completion of an online evaluation via Qualtrics. Once evaluation data has been collected, it will be analyzed and shared with individual Faculty Leaders. The purpose of the evaluation is for faculty to make improvements to their programs and to determine which activities were viewed as successful by the students.



### 3.6 FACULTY AND ON-SITE STAFF

In order to ensure the safety of the students and to maximize the success of the program, the faculty director and/or on-site coordinator will be present and on-site for the duration of the program, and will be accessible to the students at all times. Additionally, at least one member of the full-time faculty or on-site staff must be fluent in English and have a working knowledge of the language of the host country and be familiar with the country in which the program is offered. The faculty leader is also encouraged to have a working cell phone during the program for emergencies and this number should be shared with students, the Department Chair and OIP.

### 3.7 HOUSING

Students must be housed in safe, clean, and culturally appropriate lodgings, and should be provided with appropriate orientation to their housing situation. If housing options are significantly lower in quality, soundproofing, sanitation, or safety than housing normally used by students in the U.S., this should be described to students in detail prior to departure. If the program does not provide housing, information on the availability, approximate cost, and location of housing must be provided to students prior to departure.

#### 3.7.1 Host Families

If students are to be housed with local families, the families will have been vetted by a local contact and are required to notify the on-site coordinator and director if there is an emergency involving a student.

### 3.8 ACCOMMODATION FOR STUDENTS WITH DISABILITIES

The program must attempt to make reasonable accommodations for students with physical or learning disabilities by addressing mobility and other amenities at the site. It is understood that certain types of programs require students to be able to participate in physically challenging activities that may not make them accessible to students with certain disabilities. As long as the program requirements are stated in the description in the program proposal, there is no problem in designing this type of program. However, program literature should include a statement relating to accessibility concerns:

*“This program includes activities that may involve using public transportation, negotiating stairs, taking long walks, and attending scheduled classes. If you have any concerns about your ability to perform any of these activities or have other special needs or disability-related concerns, contact the faculty leader for the study abroad program in which you want to apply.”*



### 3.9 STUDENT APPLICATION PROCEDURES

Student can access program information and the application through the Bearkats Abroad Portal (Via TRM). Students should submit complete application through the portal by **MARCH 1<sup>st</sup>** for summer programs or **AUGUST 1<sup>st</sup>** for winter programs. The application requires students to:

- Upload their unofficial transcripts
- Request judicial verification from the Dean of Students to show they are in good standing with SHSU
- Request verification from the Student Money Management Center that they have completed the mandatory budgeting coaching session
- Request approval from the faculty leader
  - The faculty will receive an email from the portal with the “recommendation” request. A recommendation letter is not required.

The SAC will check for general eligibility to study abroad (minimum GPA, no holds, no serious prior disciplinary action, etc.). Individual programs may have separate application deadlines, but these deadlines may not be later than OIP deadlines unless prior agreement is reached between OIP and faculty.

#### Post-Admission Decision Application Items:

Must be submitted through the Bearkats Abroad Portal (Via TRM) by **MARCH 15<sup>th</sup>** for summer programs or **AUGUST 15<sup>th</sup>** for winter programs.

1. Emergency Contact
2. Behavior Contract
3. Liability Waiver
4. Pre-Travel Health Survey
5. Financial Aid Budget Increase Form (optional)
6. Passport copy
7. Flight itinerary

These application items will be available to the student in the portal as soon as they have committed to the program. Students will be required to complete and submit the forms through the portal. Faculty will not be responsible for distributing or collecting these documents. Documents will be forwarded promptly to faculty for pre-departure administrative use.

#### NOTE REGARDING APPLICATION PROCESS:

After a student has submitted an application and been approved for participation by OIP **and** the leading faculty, a non-refundable deposit charge will be placed on the student’s account in the amount of \$300. The student is not considered a confirmed participant,



responsible for all financial commitments of the program, until they have paid this deposit in full. Therefore, it is imperative that students are not committed to non-refundable program costs prior to their payment of this deposit, even if they insist funds will be available at another time.

### 3.10 STUDENT EXPECTATIONS

Admission requirements are based on university general admission standards and policies. At a minimum the pre-requisites for the course as stated in the course catalogue must be followed. Programs are allowed to establish more stringent admission requirements. Program prerequisites will be determined by the departments within their Colleges.

Prior to departure, faculty leaders are encouraged to outline specific expectations for their students, above and beyond academic expectations. Completion of the following documents and orientation prior to departure is required:

#### **3.10.1 Financial Responsibility Agreement**

Students are required to sign a Financial Responsibility Agreement with their student application regarding payments for the program and the refund policy prior to having charges placed on their accounts.

#### **3.10.2 Emergency Contact Form**

All students must fill out the Emergency Contact form with the student application.

#### **3.10.3 Student Behavior Contract**

All students should sign a Behavior Contract that states the faculty member has the ultimate authority to determine whether the student can continue on the trip or not. The students must adhere to the behavior contract and may be prevented from going on the trip if their conduct prior to departure is not congruent with the guidelines set forth in the behavior contract.

#### **3.10.4 Health Insurance**

All SHSU faculty-led out-of-country programs are required to incorporate the cost of insurance into the program fee. SHSU's international insurance is provided by Gallagher. Students will receive detailed insurance information during the orientation.

#### **3.10.5 Passport Copy**

Copies of each student's passport (valid 6 months after return from program) will be collected and kept on file by the faculty leader and OIP. In addition, students should be encouraged to carry a color copy of their passport while traveling.





**3.10.5.1** Note that some countries will require students to obtain a visa prior to departure or upon entry into the host country. Therefore, students must be informed of the proper steps to obtain the visa, if necessary. If faculty require assistance in this matter, OIP can provide guidance. However, OIP will not be responsible for ensuring all students are in possession of a valid visa nor do we recommend Faculty accept the burden of this responsibility for the entire program. Obtaining the proper travel visa is ultimately the responsibility of the individual traveler.

**3.10.6 Pre-Travel Health Survey**

Students are asked to complete the Pre-Travel Health Survey honestly and accurately. The form allows us to ensure that all student health/mental health accommodations are made prior to departure from the US. This form will be provided to the Study Abroad Coordinator and can be shared with the faculty leader if necessary.

**3.10.7 Liability Waiver**

Students, faculty and guests must fill out the liability waiver form before departing. Faculty will submit all of these forms to the Travel & Disbursements Office with Pre-Approval.

**3.10.8 Pre-Departure Safety Orientation**

OIP will conduct one pre-departure health and safety orientation. Attendance at this presentation is mandatory and a sign in sheet will be used. A student marked present at this presentation will serve as their acknowledgment of understanding. Students that are not present at the meeting will be emailed the presentation and this will serve as their acknowledgment of understanding. Copies of the presentation may be emailed upon request.



## SECTION 4: Emergency Protocol

### 4.1 PROTOCOL PURPOSE

The OIP Emergency Protocol has been designed expressly to safeguard the well-being of program participants and to protect the University's interests. The procedures set forth below are to be followed by the faculty leaders, university administration, staff, and students in order to effectively prepare for and rapidly respond to emergencies during SHSU's Study Abroad Programs.

- We emphasize that students who participate in the program must also take responsibility for their own safety, security, and well-being by not putting themselves in compromising situations. We caution students, and faculty, to:
  - Use common sense
  - Be alert and aware of their surroundings at all times
  - Always travel with a buddy
  - Never put themselves in compromising positions with the use of drugs or alcohol
- SHSU cannot guarantee or assure the absolute safety of participants or eliminate all risks from the study abroad environment, nor can students be monitored at all times.

It is the responsibility of faculty leaders and other university administrators to follow the procedures outlined below. Program directors must inform the students in their group about these procedures during pre-departure orientations.

### 4.2 DEFINITIONS

**Crisis:** Any event that harms or jeopardizes the health, safety, or security of SHSU students, faculty, and/or staff in a foreign country necessitating immediate action and/or involvement by the University. Can be real or perceived.

**Emergency:** Any circumstance that poses a genuine risk to or that has already disturbed the safety and well-being of program participants. Emergencies will include, though not be confined to:

- Disappearance or kidnapping of a participant
- Criminal or sexual assaults against program participants
- Serious illness, physical or emotional injury, or death
- Hospitalization for any reason
- Arrest, incarceration, or deportation
- Terrorist threat or attack
- Local political crisis
- Natural disasters



**Perceived emergency:** Events that are not immediately threatening to the health or safety of program students or staff, but which may be viewed as such by family and friends at home, or by the media. In many instances, a perceived emergency must be treated as a real emergency. It is important to assess all available data thoroughly before responding.

#### 4.3 FACULTY LEADER PREPARATION

Faculty leaders should familiarize themselves with the emergency protocol and know how to contact the appropriate people in the case of an emergency. It is recommended that faculty download the On Call 24/7 assistance info to your phone (OIP will provide direction to faculty and students), carry the On Call Plan ID card and an emergency contact card with them at all times with the following information:

- Nearest U.S. Embassy/Consulate contact information and address
- Department Chair
- Dean
- OIP
- Academic Affairs
- President's Office
- University Marketing and Communications
- SHSU University Police Department

#### 4.4 ITINERARY AND CONTACT INFORMATION

Faculty leaders will leave a detailed written program itinerary with their department and OIP with written instructions on how they can be contacted in an emergency.

#### 4.5 MEDICAL EMERGENCIES

Students should be informed that they are required to notify the Program Director about any medical emergency. The Program Director in turn is required to contact their College, respective department, and OIP. This information will be treated with the strictest confidentiality and will be shared by the Program Director on a “need to know” basis only. If the crisis involving the student is grave enough to jeopardize his or her safety or wellbeing, the emergency contact he/she has provided at the time of registration will also be informed.

#### 4.6 STATE DEPARTMENT REGISTRATION

The faculty leader and students should register with the U.S. State Department through their Smart Traveler Enrollment Program: <https://step.state.gov/step/> This will alert the local US Dept. of State presence that the group is traveling within the country and aid in their response time in case of contingency.



## 4.7 EMERGENCY RESPONSE GUIDELINES

### 4.7.1 For Faculty Leaders

1. In an emergency, the faculty leader's first responsibility is to safeguard the safety and wellbeing of program participants. They should do whatever is necessary to assure this, whether this means obtaining prompt and appropriate medical attention, Embassy intervention, or police protection.
2. When all has been done to assure the participants' wellbeing, the faculty leader should contact their department and/or Dean and brief them in detail about the situation. The department head should then report these details to the Dean.
3. On Call International 24/7 Global Response Center should be contacted to assist making logistical arrangements and provide advice. When you contact On Call SHSU will be notified and any potential expense will be reviewed.
4. In an emergency, the faculty leader should urge participants to contact emergency contact as soon as possible to advise them of their personal situation. Wherever necessary, the faculty leader must facilitate such contact.
5. As necessary, the faculty leader should notify the local U.S. Embassy or Consulate about the crisis and follow whatever procedures they may require. If there is a continuing risk to the welfare of the students (during a terrorist threat, for example), the faculty leader should ask the appropriate Embassy or Consular Official to advise him/her on a regular basis about the evolution of the crisis, and about how the students should respond.
6. In a medical emergency, the faculty leader or appropriate designee should accompany the student to an appropriate health care provider. Details should be kept confidential unless the participant grants permission for them to be shared. If a medical emergency is critical and the emergency contact needs to be informed, the department head should contact the emergency contact.
7. During an on-going crisis, the faculty leader should keep the department and OIP informed on a regular basis, daily or as need dictates.



8. Depending on the acuteness of the crisis, a crisis response team may be assembled to decide on a course of action that the faculty leader and students need to follow.
9. During a political crisis or some other emergency during which foreigners in general or U.S. citizens in particular may be at risk, the faculty leader should tell the students to keep a low profile; tell them to avoid demonstrations, confrontations or situations where they could be in danger; avoid behavior that could call attention to themselves; avoid locales where foreigners or U.S. citizens are known to congregate; and take down signs, avoid using luggage tags and wearing clothes that would label them as U.S. citizens.
10. In the event of a significant crisis, students have the option of returning to the U.S. Every reasonable effort will be made to allow them to continue their academic program on campus, and to be housed appropriately as well. Refund policies are outlined below.
11. Faculty members and students will be evacuated or sent home if a situation deteriorates to the point where the degree of risk to participants is deemed unacceptable. If this unlikely event were to happen, the crisis response team, in consultation with the faculty leader, the U.S. Embassy and State Department, and appropriate individuals on the home campus, would develop an evacuation plan in as much detail as possible.

#### **4.7.2 For Department Heads and Others Acting as the Crisis Response Team**

Upon receiving a call from the faculty leader of a Study Abroad program (or from an emergency contact or other source) involving a serious injury, death, or emergency, the department head will:

1. Start a log of all calls and activities.
2. Get the following information from the faculty leader:
  - a. Name of caller and of victim(s), if any
  - b. Brief description of accident, injuries, and/or emergency, the steps that have been taken and the status
  - c. Location of caller (street, city, country)
  - d. Location of accident or emergency. How close is it to students and staff?
  - e. Phone, cell phone, fax, or beeper number where caller is
  - f. Find out if rescue squad, local law enforcement, U.S. embassy/consulate have been called if appropriate
  - g. Has any information been released to the media?



3. If an emergency – real or perceived – occurred, ask for detailed answers to these questions:
  - a. What impact, if any, did any emergency have on availability of food, water, and medical supplies?
  - b. What was the target of unrest, if the event was political?
  - c. What is the intensity of the emergency or of the political unrest?
  - d. Are there military or emergency personnel at the site of the emergency?
  - e. Is continuation of classes feasible?
  - f. Are our students and staff able to travel in the country?
  - g. What is the advice of the nearest U.S. embassy or consulate?
4. DO NOT MAKE ANY STATEMENT TO THE PRESS. Once a thorough evaluation of the situation has been made from the faculty leader's perspective, the Department Chair or College authority should notify the Director of Marketing & Communications, Public Information Officer at SHSU (936-294-1833)
5. If an emergency has occurred, call the U.S. Department of State Citizen Emergency Center at 1-888-407-4747 (from overseas: 202-501-4444) for suggestions or assistance.

#### 4.8 CLERY ACT AND REPORTING REQUIERMENTS

If SHSU sends students to study abroad at a location or facility that SHSU does not own or control, SHSU does not have to include statistics for crimes that occur in those facilities. However, if SHSU rents or leases space for students in a hotel or student housing facility, SHSU is in control of that space for the time period covered by SHSU's agreement. Host family situations do not normally qualify as non-campus locations **unless** SHSU's written agreement with the family gives SHSU some significant control over space in the family home.

#### 4.9 STATE DEPARTMENT TRAVEL ADVISORIES/Tsus TRAVEL INSURANCE EXCLUSION

It is the policy of the Texas State University System not to approve student travel to locations under a U.S. Department of State Travel Advisories level 3-4. Further, it is the policy of Sam Houston State University not to approve travel to locations not covered entirely under the TSUS travel insurance policy with Gallagher. If travel to a location under Travel Advisories level 3-4 and/or excluded from Gallagher Insurance coverage is proposed, all travelers must sign a waiver that has been approved by the Vice Chancellor and General Counsel. If a Travel Advisory level 3-4 is issued for the area where a Sam Houston State University program is being conducted, the updated information must be distributed promptly to students, and students must be permitted to withdraw. Students

will be refunded any non-expended fees. Relocation of program may also be considered in case of various contingencies.

It is highly recommended that all students/faculty/staff traveling on a study abroad program to **any location** purchase additional travel insurance that provides coverages for costs incurred due to the unforeseen issuance of a Travel Warning or any number of other contingencies. More information on specific insurance providers can be obtained from the Study Abroad Coordinator. *See also Section 3.9.4*

## APPENDICES

*All forms associated with the faculty-led proposal process are located on the OIP website (<http://www.shsu.edu/dept/international-programs/study-abroad/faculty-led-programs/information-for-faculty.html>)*

Forms are updated each year. Current forms should always be submitted.