

Faculty Director and Program Leader Handbook for Education Abroad Program Development

This manual was created by the Office of International Studies and Programs (OISP), in conjunction with Study Abroad and Exchange Programs (SAEP), to assist faculty and staff in the development of successful faculty-directed education abroad programs. Contact SAEP staff for consultation or assistance.

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Roles and Responsibilities for Faculty Directors and Program Leaders

There are several dimensions of the Faculty Director and Program Leader's role. In addition to curriculum development, teaching, grading, and academic monitoring, Faculty Directors and Program Leaders assume the roles of administrators, budget managers, recruiters, travel logistics coordinators, cultural guides, counselors, onsite student services coordinators, and risk managers. In supporting students, Faculty Directors and Program Leaders are responsible for students' social lives, group dynamics, mental and physical health, safety, and alcohol use. The roles of Faculty Director and Program Leader are diverse, intensive, challenging, and highly rewarding. It is demanding of a faculty or staff member's time and energy during the planning and preparation stages, and while abroad.

Faculty Directors and Program Leaders carry most of the responsibilities for developing and executing their program, including, but not limited to, program proposals, logistics, student recruitment, orientation, and the education abroad experience itself.

Responsibilities of Faculty Directors and Program Leaders include:

Program Approval and Planning: Obtaining Department, School and/or College approval to teach the proposed education abroad course. Working in close cooperation with SAEP and OISP throughout the planning and execution phases.

Location Selection: Determining that the chosen destination is relevant to learning outcomes and that it will not be a dangerous environment for the students or pose a threat to their health or safety. Be sure to check the U.S. Department of State's Travel Advisories for each country to be visited.

Travel and Logistical Arrangements: All travel and logistical arrangements will be finalized with the assistance of Study Abroad and Exchange Programs, a program provider, and/or onsite coordinator. It is the responsibility of Faculty Directors and Program Leaders to be involved in all planning of these arrangements. Making and coordinating all logistical arrangements relating to the academic content of the course, as well as all that is involved in directing students to and from foreign countries.

Budget Management: Faculty Directors and Program Leaders must provide detailed budget figures for all academic and travel expenses. Study Abroad and Exchange Programs will assist in creating a final budget and creating the final cost to each student.

Financial Management: Preparing and signing necessary agreements and/or contracts with other directors, instructors, tour companies, guides, and/or other entities.

Marketing and Recruitment: Program-specific marketing and the recruitment of students is one of the primary responsibilities of Faculty Directors or Program Leaders. Study Abroad and Exchange Programs itself will publish brief descriptions of the program and assist with general marketing for all faculty-directed programs. Faculty Directors and Program Leaders are responsible for developing a course description, which should incorporate brief narratives of the academic course, program structure, as well as prerequisites, degree requirements, housing and meals, and any physical demands students must meet to participate in the program. Faculty Directors and Program Leaders should expect to promote their program to students and peers, to visit classes, to conduct multiple information sessions, and create printed and e-publications as needed.

Enrollment: Study Abroad and Exchange Programs will coordinate the student enrollment process with the assistance of the Faculty Director or Program Leader. All students are required to submit an application and acceptance paperwork by the dates specified by Study Abroad and Exchange

Programs, the Faculty Director, or program provider. Students will be selected based on eligibility requirements, the application, and other requirements, such as an interview or essay.

Pre-Departure and Onsite Orientations: Study Abroad and Exchange Programs will conduct a mandatory general pre-departure orientation for all education abroad participants; however, Faculty Directors and Program Leaders are responsible for conducting at least one program-specific pre-departure orientation and an onsite orientation in the host country. Directors should review health, safety, and security concerns, relevant aspects of host country culture, and site-specific information.

Health, Safety, and Emergency Management: Create an emergency preparedness plan for each destination visited during the program. Explain risks, precautions, and crisis management plans to students.

Faculty Director and Program Leader Behavior: This program is an extension of the Faculty Director or Program Leader's university work and should be viewed as such. Adhere to university policies and avoid inappropriate behavior. Remember that Faculty Directors and Program Leaders set the standard for behavior. Faculty Directors and Program Leaders cannot tend to these responsibilities if they are impaired. It is the responsibility of Faculty Directors and Program Leaders to ensure students' safety. They are expected to be on-call at all times during the entire program. Maintaining professional and courteous behavior at all times with CWU on-campus staff, international staff, international liaisons, students, and parents. Setting an example of leadership and ambassadorship while traveling with the students.

General Supervision of Students: Faculty Directors and Program Leaders will supervise and direct students in the academic and intercultural goals of the program. They are the primary adults responsible for the supervision and welfare of the students participating in the program. Among other things, Faculty Directors and Program Leaders are responsible for supervising and monitoring each student's conformation to university and other applicable policies, rules, regulations, and standards of conduct. Faculty Directors and Program Leaders should be familiar with the disciplinary rights and procedures that are contained in the [Student Conduct Code](#) (WAC 106-125).

Cancellation of the Program: The University reserves the right to cancel a program at any time before or after departure, at its sole discretion. If this program does not reach minimum enrollment by the final application deadline, it may be cancelled. Faculty need to consult with OISP before cancelling a program.

Withdrawal of Director Position: It is expected that Faculty Directors or Program Leaders will not withdrawal from their position except in an emergency. If it is impossible to serve as Faculty Director or Program Leader, immediately notify Study Abroad and Exchange Programs in writing.

Developing a Successful Education Abroad Program

Program Approval Process

Crucial steps to follow within the proposal process involve planning logistics, planning travel, and academic overview. Keep in mind while developing the program that the university's academic policies and procedures for on-campus courses apply to all education abroad courses as well. The essential parts to consider are the program objective. These include academic expectations, pre-departure requirements, methods of instruction, housing and meals, transportation, tentative itinerary, and how everything fits together as a whole. The key is to have a proposal with an equal balance of academic value, international education experience, and affordability.

After having preliminary discussions with Study Abroad and Exchange Programs staff, Department Chair, and Dean, prospective Faculty Directors and Program Leaders are encouraged to seek out and work with a program provider to develop and assist with the proposed program. A list of approved program providers and travel agents is available in Appendix F.

Steps for Developing and Submitting a New or Renewal Program Proposal

NB: The renewal proposal is permitted if: 1.) there are no significant changes to the structure or content of the program (e.g., no changes to course, itinerary, budget, location, syllabus, etc.) and, 2.) there has been no gap in offering the program. If such changes have been made or if there has been a gap in offering the program, then a full proposal is required.

Developing and planning an education abroad program is a vastly greater undertaking than developing an on-campus course. Generally, the more advanced planning that takes place, the more successful the program will be. It is recommended to begin work on the program at least eight months to a year before the program takes place. Proposals must be submitted by the appropriate deadline (i.e., June 15 for Spring and Summer Quarter programs and December 1 for Fall and Winter Quarter programs). A program development timeline is available in Appendix B. Faculty Directors and Program Leaders should allow enough time for program marketing and student recruitment, which will help mitigate financial risk in order to avoid a cancellation of the program. Likewise, if a visa is required to entry your host country, allow ample time for visas to be processed. International students are more likely to be required to obtain a visa than U.S. citizens.

A complete proposal application consists of the following:

- Faculty-directed program proposal/renewal application, with signatures from Co-Directors/Leaders, Department Chair, and Dean
- Syllabus and course description for each course proposed
- Outline of course-related and cross-cultural activities and excursions
- Budget of estimated expenses, with actual quotes from vendors/providers
- Detailed program itinerary
- Curriculum vitae for all program directors and leaders
- Promotional materials (optional)
- Student evaluations from past programs (if available)

Additional Resources

First-time Faculty Directors or Program Leaders should consider consulting the following resources:

- Study Abroad and Exchange Program staff
- Colleagues at CWU who have previously directed education abroad programs

- Speak to students. It is often helpful for Faculty Directors and Program Leaders to assess the level of student interest for a program by asking for input from a select group of students.

Important Program Design Elements to Consider

Academic Content

Whether a credit-bearing experience or not, an education abroad program is an academic endeavor not a trip. Travel associated with the program is neither a vacation nor tourism. To help students manage their expectations, this important difference should be clearly communicated.

The objectives and learning outcomes are at the core of any program and influence virtually all other aspects of it, including destination(s), course type and structure, and activities. Designing a successful program begins with identifying those objectives and learning outcomes, both academic and cultural, and working backward. While naturally there will be some *aspects* of tourism in an education abroad program, they should serve to enhance participants' academic and cultural learning, so that the program as a whole transcends tourism.

It is important that courses included in faculty-directed education abroad programs maintain academic rigor equal to those delivered on-campus. Faculty Directors and Program Leaders are reminded that, per WAC 250-61-050(9), one credit hour requires a minimum of 30 hours of instruction and student work. Nonetheless, it is recognized that education abroad is, by its nature, a hybrid experience. Therefore, please use the following guidelines in calculating the credit value(s) of the course(s) taught as part of the program:

- Student free time may not be included in calculations of program credit value.
- Students may not receive credit in multiple courses for the same activity.
- Unless utilized as opportunities for direct instruction, travel and meal times may not be included in calculations of program credit value.
- Programs awarding internship or research credit must follow the same standards as similar programs completed on-campus.

Course Designation

Faculty Directors and Program Leaders proposing courses not currently in the University catalog may need to adhere to the University curriculum development process and deadlines. Faculty Directors and Program Leaders should consult their Department Chairs and Deans. Courses should be intentional with regards to cultural learning and take full advantage of their host countries and cultures.

Location

The program location is a critical element. There should be a synergy between the program location(s) and the program's academic purpose.

Consider these questions:

- How does the location serve and facilitate the desired learning outcomes?
- What experience and/or connections do the program leaders have with the location, its culture and/or language?
- Does CWU have partnerships or connections in the location(s) that may be leveraged?
- What is the level of student interest in the location, or how can it be generated?
- Are there other CWU programs to this location? Do these programs compete? Is there an opportunity for cooperation?

- What risk factors are associated with the location and how can they be mitigated?
- How expensive is the location, both in terms of cost of living and of travel to and from it? Are there more affordable alternative sites that will serve the learning outcomes?
- How long does it take to travel to the destination? Is this reasonable given the program's proposed duration?
- What are the entry and exit requirements? Is a visa required? What is the process? Is there a difference between U.S. citizens and non-U.S. citizens?
- How would teaching in this location enhance the learning experience better than teaching at one of the CWU locations?
- If considering a multi-destination—particularly multi-country—program itinerary, how does the itinerary support program content and learning outcomes? What are the implications of such an itinerary in regard to cost and risk?

Program Timing

Program timing may affect student recruitment. Most programs run during Spring Break and Summer Quarter. Neither Spring Break nor summer programs may depart during the week of final exams. Programs that happen during late August or early September may be considered Fall Quarter programs, if approved with the initial proposal. Some timing considerations:

- More financial aid is available during the regular academic year than during summer.
- If there are major holidays in the host country, then services such as transportation, accommodations, and meals may be impact the group and limit programming time.

Duration

The length of the program will determine a variety of things, including cost, time, and level of student interest. It is important to choose a time frame that will allow students to gain a worthwhile academic experience for the most affordable price. Consider:

- Does the length of the program limit the number of participants?
- Could the program be redesigned to appeal to more students by including some on-campus work followed by a shorter period abroad?
- Does the length of the program make financial sense to students?

Spring Break Programs

Faculty Directors and Program Leaders choosing the Spring Break option may be challenged to create a meaningful, pedagogically sound program for such a short period of time. Therefore, Faculty Directors and Program Leaders are encouraged to incorporate the program into a Winter or Spring Quarter class.

Summer Programs

Faculty Directors and Program Leaders opting for longer programs that coincide with CWU summer sessions should consider the following:

- To qualify for summer financial aid, students must be enrolled for a minimum of six credits over all summer sessions.
- Does summer travel increase the cost of the program, particularly airfare?

Health & Safety

The university has an obligation to ensure the health and safety of students and employees and to manage risk associated with international travel and education. To this end, the program proposal contains a questionnaire designed to help program leaders compile an extensive profile of potential

risks associated with the program and its destination(s). These questions can also help program leaders shape their program.

The following resources may help in researching health and safety issues:

- CWU Student Disability Services: <http://www.cwu.edu/disability-support/>
- U.S. Department of State: <https://travel.state.gov>
- U.S. Department of State Human Rights Reports: <https://www.state.gov/j/drl/rls/hrrpt/index.htm>
- Overseas Security Advisory Council (OSAC): <https://www.osac.gov>
- Centers for Disease Control and Prevention: <https://www.cdc.gov/travel>
- Government of Australia Travel Advice: <http://smartraveller.gov.au>
- Government of Canada Travel Advice: <https://travel.gc.ca/travelling/advisories>
- Government of Ireland Travel Advice: <https://www.dfa.ie/travel/travel-advice/>
- Government of New Zealand Travel Advice: <https://www.safetravel.govt.nz/travel-advisories>
- UK Foreign Office Travel Advice: <https://www.gov.uk/foreign-travel-advice>
- World Health Organization Travel Health: <http://www.who.int/topics/travel/en/>
- International Lesbian, Gay, Bisexual, Trans and Intersex Association (ILGA): <http://ilga.org/>

High Risk Destinations

The University reserves the right to deny travel to high-risk destinations, such as those under a Level 3 or Level 4 Travel Warning from the U.S. Department of State or a Travel Health Warning from the Centers for Disease Control and Prevention. (NB: Some countries, such as Mexico, have an overall designation, as well as specific state or regional designations.) Nonetheless, exceptions may be made on a case-by-case basis after a specialized review process. Per University policy, this review is required if the host country/non-state region or any of its sub-regions is subject to such a warning.

Programs to such destinations must demonstrate support by an approved, contracted University affiliate (i.e., host institution abroad, collaborating U.S. institution or third-party program sponsor).

Procedure: Program leaders are responsible for compiling and submitting the required application materials themselves. While there is much overlap, this is a separate application and review from the faculty-directed education abroad program proposal and does not replace that proposal.

Applicants are encouraged to apply early, though complete applications must be submitted for review no later than 6 weeks prior to departure. No financial commitments (e.g., booked airfare) should be made prior to receiving approval.

The application must generally show the academic value of the program and how the structure of the program and safety procedures in place mitigate the concerns of the travel warning. Requests associated with sites not affiliated with a university or established sponsoring agency and requests to countries with high-level DOS or CDC warnings require substantial documentation.

Costs

Program Fee

The program fee is an important aspect that will determine if a program is feasible. An education abroad program in Western Europe may be attractive to students, but can the program be made affordable? Simply put: if the program fee is too high, the program will have difficulty recruiting students. It is important to put together a list of estimated expenses during the planning stage. Remember to consider current exchange rates and how they might affect the final cost. The budget template in Appendix C will be a useful tool for determining program costs.

Application Fee

All students will be required to submit a non-refundable application fee, currently \$75.

International Medical and Emergency Insurance Fee

All travelers will be enrolled in the University's international medical and emergency insurance policy, unless a waiver is granted. The cost of insurance is \$1.62 per day (subject to change).

Additional Costs

- Third-party providers and travel agents often charge a fee for their services. Be sure to obtain copies of quotes to include in the program budget. These expenses will need to be included in the budget, with appropriate comments in the notes section.
- Additional student expenses not collected by the program/university. These expenses can add up quickly and should be shared with students so they can make a fully informed decision before applying to the program. These expenses may include:
 - CWU tuition
 - Airfare, if not included in overall program fee
 - Personal spending money
 - Passport and visa fees
 - Vaccinations
 - Transportation to SEATAC or other airport
 - Meals not included in the program fee
 - Phone charges for the purposes of risk management and program communication

Targeted Audience and Promotion/Marketing

Equally important is understanding your pool of potential applicants. Who are the target students? How deep is the pool of potential applicants? Which student groups or organizations might be interested in the program?

Strong marketing materials are essential to successful recruitment. Faculty Directors and Program Leaders are encouraged to design and create their own fliers, brochures, posters, emails, web announcements, etc. Study Abroad and Exchange Programs can provide some assistance in designing these materials. Distribution of marketing materials is the primary responsibility of the Faculty Directors and Program Leaders, though SAEP is happy to have them displayed in our office and available at information sessions and tables.

Information sessions and classroom visits are very effective ways to engage with students and promote the program. Study Abroad and Exchange Programs holds weekly general information sessions, which Faculty Directors and Program Leaders may attend to speak about the program. Similarly, Faculty Directors and Program Leaders are invited to attend the Education Abroad Fair every October. Faculty Directors and Program Leaders may also recruit from other institutions, provided these students enroll at CWU as non-matriculated students.

Logistics

Faculty Directors and Program Leaders are encouraged to use vendors to assist with arranging the program's logistics. Vendors may include third-party providers who specialize in study abroad, travel agents, partner institutions, etc. A list of third-party providers and other vendors can be found in Appendix F. Some benefits of using a vendor include: freeing time for the Faculty Director to focus on the program's academic components; lessening the burden of managing contracts, invoices, and shifting logistics; and allowing Faculty Directors and Program Leaders to remain more student-focused while on the program.

Third-Party Providers

Considering faculty time constraints, program options, and the extent of services provided, Faculty Directors and Program Leaders may decide to use one of CWU's third-party program sponsor partners (also frequently called providers) to help coordinate and arrange logistics. Many of the third-party partners CWU students use for individual programs abroad also have units specializing in supporting faculty-directed programs. While using program providers may add some additional costs to the program, many can plan around a particular student price point. Depending on the structure of the program, third-party providers may help create the program itinerary; arrange accommodations, classroom space, guest lecturers, transportation, and/or excursions; provide on-site cultural and city orientations; lead excursions and field trips; and serve as an on-site contact for non-academic student issues, including emergencies.

By working with a third-party provider, Faculty Directors and Program Leaders are able to focus more attention on the academic components of the program, while allowing the provider to handle all logistics. Typically, these organizations have in-country staff that will be able to assist in emergency situations, as well as guiding Faculty Directors or Program Leaders through the logistical process necessary to ensure the success of the program. A program provider will simplify the program development process immensely. A list of preferred program providers can be found in Appendix F of this handbook.

Partner University

Faculty Directors and Program Leaders may choose to develop a program with one of CWU's established partner universities or forge a new relationship. The advantages of working with a partner university may include access to courses, classroom space, on-campus accommodations, assistance with on-site logistics, and opportunities to interact with faculty and students in the host country. Faculty Directors and Program Leaders interested in this option must consult with Study Abroad and Exchange Programs prior to establishing a partnership.

Disadvantages Faculty Directors or Program Leaders might encounter in developing a new relationship are the additional time and effort required to establish a partnership with a university abroad and the responsibility of providing reciprocal services for groups from the partner university at CWU.

Independent

Faculty Directors and Program Leaders also have the option of working independently to coordinate logistics. This option provides the most flexibility, but also requires the director to make all travel arrangements, secure classroom space if needed, and provide all instruction. An independently coordinated program will utilize a variety of resources, including faculty directors' own connections, travel agents, partner institutions and others.

Travel Agencies

Faculty Directors and Program Leaders must purchase air travel through a CWU-approved travel agency. CWU has made arrangements with Travel Leaders and Wright Travel to provide services to the university. These agencies can invoice the university directly, though a Travel Authorization must be approved.

Agency:	Travel Leaders	Wright Travel
Address:	807 W. Yakima Ave. Yakima, WA 98902	PO Box 15328 Seattle, WA 98115
Phone:	(800) 735-2526	(206) 524-8524
Fax:	(509) 575-0726	(866) 501-8872
Email:	valoryt@hotmail.com	sarah@wrighttravel.com
Web:	travellers.com	wrighttravel.com
Contact:	Valory Thomas	Sarah Wright

Additional Air Travel Resources

- Local travel agents can arrange group or independent travel (e.g., Ellensburg Travel)
- Travel services that specialize in student travel: [Student Universe](#) and [STA Travel](#)
- Airline websites
- Travel websites, such as Travelocity, Hotels.com, etc., may be used for researching costs but should not be used for making bookings.

Lodging and Meals

- Where will the group be staying and what meals will be included?
- Are meals included with accommodations?
- Will there be group meals?
- Where will the students take their independent meals?

Classroom Space

- Is classroom space required?
- Do the accommodations have meeting space?
- Will classrooms be needed daily, or at special times?
- Is there a charge for classroom space?
- What equipment is needed in the classrooms?

Passports

Information on applying for a US passport can be found at the [Department of State's website](#), and Study Abroad and Exchange Programs also maintains a one-page quick guide. Faculty Directors and Program Leaders should encourage students to apply for passports early, as soon as their decision to participate in the program is concrete. Standard processing time is approximately 4 to 6 weeks. Early application for passports is especially important if a visa is required to enter the host country. As a general rule, passports should have at least six months of validity when traveling internationally; many countries will not permit a traveler to enter their country unless the passport is set to expire at least six months after the final day of travel.

Visas

Visa requirements are available from the website of the host country's consular office with jurisdiction over Washington State. If a visa is required, a traveler generally must obtain it before traveling abroad. It is important students have sufficient time for processing the visa application, especially if the application is by mail. Most foreign consular offices are located in major cities and, in some instances, travelers may be required to appear at the consular office in-person to lodge their applications. Non-U.S. citizens should consult the host destination country's/countries' requirements for nationals of their country of citizenship, as well as relevant guidance from their country of citizenship.

To help facilitate the visa application process for some countries, a visa service may be used. Some countries may even mandate the use of a particular agent. Visa agents are generally located in major cities where embassies and consulates are established (e.g., Seattle). For a fee, an agent will provide instructions and guidance during the application process and submit the visa application to the appropriate embassy or consulate. In some cases, when visa applications must be delivered in-person, these agents can serve as legal representatives with the authority to deliver and retrieve visa materials.

It is the responsibility of the traveler to obtain visas, where required, from the appropriate embassy or consulate. Study Abroad and Exchange Programs can offer limited assistance with and advice on this process, but is happy to do so to the extent possible. International students traveling as part of a faculty-directed program must be aware of entrance and visa requirements for all countries they will visit.

Financial Matters

Financial matters related to faculty-directed programs are governed by applicable university policy and Washington State law. Occasionally, policies and laws change without warning; in these cases, Study Abroad and Exchange Programs will make every effort to address issues when they are identified. Faculty Directors and Program Leaders are equally responsible for ensuring that programs operate in compliance with CWU policy and state law and are encouraged to seek clarification should procedural questions arise.

Budget

Much of the planning of the budget comes down to estimation, because the exact number of participants is unknown at this stage; however, Faculty Directors and Program Leaders can begin planning their budget using the budget template (see Appendix C). **Estimated quotes from providers must be included with the proposal application materials.** It is understood that costs may fluctuate due to a variety of reasons. In these instances, updated quotes, estimates, contracts, or other pertinent documents must be submitted to the OISP Fiscal Specialist for review and oversight purposes.

The program budget is an indicator of the feasibility and affordability of the program. All overseas programs must be affordable for students to comply with state law and university policy, and must be financially self-supporting. When developing the budget, keep these two points in mind:

- Identify all costs to students, even those outside the budget, and base these costs on accurate information
- Develop the highest quality program at the lowest reasonable expense to students

The program fee represents only part of the total program-related expenses to students. Students must also pay for international airfare, passport and visa costs, meals not included in the program, spending money, etc. Approximately 76 percent of CWU students receive some form of financial aid. These students are more likely to participate in education abroad programming that is more economical.

Developing the Budget

Study Abroad and Exchange Programs will work with Faculty Directors and Program Leaders to develop a viable budget for the program. Budget development is critical to the success of the program and it may require some time to finesse and finalize. Faculty Directors and Program Leaders will decide which items are included in the program fee. Typically, provider or vendor fees, accommodations, meals, in-country group transportation, excursions, and entrance fees are included. Occasionally, airfare is also included in the overall cost of the program.

Understanding the Budget Template

The budget template consists of six main sections: Program Information, Individual Student Expenses, Shared Administrative Expenses, Additional Student Expenses, and Fee Payment Schedule. All sections must be completed before the budget is approved. The top section of the template collects important information about the program. Individual Student Expenses are borne directly by students, whereas Shared Administrative Expenses are divided amongst the number of student participants. Group costs and faculty expenses should be included as shared costs. Additional Student Expenses are also paid directly by the student. Many additional costs will be individual to the student. The final section outlines the student payment schedule.

Program Fees

Program fees are collected directly from students. These fees are posted to students' MyCWU student financial accounts (**NB: Fees and payments should never be collected directly from the student by the Faculty Directors or Program Leaders!**). Often, the program fee is collected via multiple payments — for example, a \$500 deposit may be due upon a student's acceptance into the program, with two payments due later. Payment deadlines for students should be based on payment schedules to vendors or providers. It is advisable to consider when financial aid is disbursed to students. This typically occurs within two weeks of the start of the quarter. Additionally, any program fee due in the quarter in which the program will run should be paid automatically when aid for that quarter is released. However, students should consult a financial aid counselor to verify their individual aid package. For more information on financial aid, see the section below.

Student payments cannot be due later than two weeks before the vendor payment is due. The financial review and approval process involves many offices within the Office of Academic and Student Life. Therefore, payments to vendors may require up to two weeks to fully process. *NB: payments to vendors may be delayed due to holidays, staff vacation, etc.*

Emergency Fund

An important element in a program's budget is the emergency fund. All faculty-directed budgets must include a minimum of \$500 or \$100 per participant, whichever is greater. This fund is intended to only cover emergencies. Unused contingency funds are refunded to students, as applicable.

Contingency Fund

Another important element in a program's budget is the contingency fund. Every budget must include a contingency fund. The exact amount will be based on five percent (5%) of the total program fee. This fund is intended to cover incidental expenses, such as fluctuations in prices or exchange rates. There are no CWU or Study Abroad and Exchange Programs emergency funds for programs that run out of money. In such an event, the Department of the Faculty Director or Program Leader will assume the financial burden or cost overages. Faculty Directors and Program Leaders are expected to incorporate sufficient money into the program fee for unforeseen events and expenses, and/or ensure the program has the financial backing of the Department or College. If the Department elects to cover the cost of the contingency fund, it must provide written confirmation. Unused contingency funds are refunded to students, as applicable.

Billing and Financial Aid

Study Abroad and Exchange Programs will work with Student Accounts to post program fees. Study Abroad and Exchange Programs also works with the Financial Aid Office to create a cost sheet (i.e., Cost of Participation, or COP) that projects estimated student expenses. The COP is shared with students and the Financial Aid Office. If the budget includes payment for services prior to the start of the program, be aware that financial aid for education abroad is disbursed on the first day of the quarter or 10 days prior to the program start date, whichever is later. Financial aid may affect students' ability to pay for up-front expenses. Students may apply available aid from any quarter towards program costs. To do so, students must work with the Financial Aid Office.

Minimum Enrollment

Typically, program budgets are based on a minimum enrollment of 12 students. Minimum enrollment helps ensure that the program fee is not a financial burden on students. Programs can run with more students than the minimum and are occasionally allowed to run with fewer students with submission of a revised budget. The program should fee not increase. Instead, expenses in the budget should be adjusted in order to maintain the advertised price.

Budget Adjustments

The program budget will change as the actual number of participants is determined, if quotes from providers are revised, and/or as currency exchange rates fluctuate. Though the budget submitted with the proposal should be thorough and as accurate as possible, there will be room for modifications once the program is approved and before a price is advertised to students; however, the price of the program needs to be determined in the proposal to ensure the program is viable.

Contracts

Study Abroad and Exchange Programs will advise Faculty Directors and Program Leaders and their chosen vendors/providers when drafting contracts for services and goods. Study Abroad and Exchange Programs acts as the intermediary between Faculty Directors, Program Leaders and the University. Faculty Directors and Program Leaders are expected to interface directly with providers. Contracts are organized through the Office of Contracts, Purchasing, and Surplus Inventory. Many providers will have their own contracts or memoranda of understanding. If a provider cannot furnish such an agreement, then Faculty Directors and Program Leaders should work with Study Abroad and Exchange Programs to develop a CWU Standard Agreement. All contracts and agreements must go through a review and oversight process, which may take several weeks to complete. The University will only make payment to a provider once a final contract or agreement has been signed by all parties (and only after all student fees are paid).

Standard Agreements

Like a contract, a standard agreement is a legal and binding agreement between CWU and a vendor or third-party provider. It states the agreed on services and materials to be provided to the education abroad program, as well as a timeline for delivery and payment. The agreement should be as clear and as detailed as possible, and must include:

- The dates on which the agreement is entered, when the services will commence and be completed, and payment due dates
- The name and contact information of the provider, including their IRS identification number (if provider is based in the U.S.) or the Foreign Source Statement (if the provider is not based in the U.S.)
- Detailed description of services and/or materials that will be provided to the group
- The total cost or price per person that the provider quoted

A draft of the standard agreement will be submitted to OISP. At this stage, changes to the agreement may be proposed or required. Once the draft is approved, it will be sent to the provider to be reviewed, approved, and signed. If the provider suggests changes to the agreement, the amended draft will need to be resubmitted to OISP for additional review. Faculty cannot sign contracts on behalf of the university.

Payments to Providers

Whenever possible, funds should be wired or paid by requisition to the program provider or host institution abroad to cover program costs. This eliminates the need for the Faculty Director and Program Leaders to carry large sums of cash with them while traveling.

In order to initiate payments, including advance payments, Study Abroad and Exchange Programs will work with OISP, Faculty Directors, Program Leaders, and providers to complete a purchase requisition. The provider should submit an official itemized invoice to Study Abroad and Exchange Programs at least 30 days prior to the payment due date. The invoice should contain the following information:

- Name of provider
- Address and contact information of provider
- Payment amount and cost per student
- Currency type (to avoid confusion and overpayment, U.S. dollars is the preferred currency)
- Payment due date
- If payment will be made through wire transfer, please also include:
 - Name, address, and contact information of provider's bank
 - Provider's account number (and account name, if applicable)
 - SWIFT code of provider's bank (and bank routing number if used in the destination country)
 - Currency of wire transfer. *NB: International wire transfers incur service fees charged by the banks involved.*

To complete payments, the following must also be submitted with the requisition:

- Roster of student and faculty/staff participants
- Copy of program budget
- Copy of Foreign Source Statement (if provider is based outside the U.S.)
- Copy of signed contract or standard agreement

Payments to Providers and Vendors Without a Contract or Standard Agreement

If an agreement cannot be established, payment to the provider may still be made using alternative payment methods:

- One option is to obtain and use an individual CWU Corporate Travel Card. This can be done through the Travel Desk. This card may be used to purchase certain items, such as airfare. The card holder is personally responsible for managing the monthly balance and payments of the card. Faculty Directors and Program Leaders who use their travel card for program-related expenses should seek reimbursement once the program finances are reconciled.
- Alternatively, Faculty Directors and Program Leaders may be able to use their Department's travel card, dependent on their policies and procedures. Arrangements would be managed by Faculty Directors and Program Leaders and their Department. Study Abroad and Exchange Programs is able to transfer collected program fees to departments via a charge-credit.
- Study Abroad and Exchange Programs also maintains a travel card that can be used for certain expenses. Directors and leaders should consult with Study Abroad and Exchange Programs regarding this method.
- If a Faculty Director or Program Leader pays out-of-pocket for program-related expenses, they will not be reimbursed until the program finances are reconciled.

Travel Authorizations

In order to complete a payment to a provider, Faculty Director and Program Leaders must have an approved Travel Authorization on file. The Travel Authorization must include a roster of all travelers, (students, staff, and faculty) as well as the program itinerary. See the University's online [Foreign Travel Procedures](#) (CWUR 3-50-265) for more information. Study Abroad and Exchange programs will provide appropriate speedkeys and financial codes.

Cash Advance

An advance for travel expenses is available to state employees traveling on official business. Cash advance requests must be at least \$100 and must not exceed 30 days authorized per diem allowance. The online cash advance request must be submitted by the traveler when completing their online travel authorization at least five working days prior to the departure date.

The traveler is responsible for refunding any unused cash advance at the cashier's office, Barge 105. All cash advances must be refunded to CWU within 30 days after the program's return, according to the [State Administrative and Accounting Manual \(SAAM\) section 10.80.60.d](#). Advances not settled within the allowable period are considered delinquent accounts and will accrue interest charges.

Employees may have only one cash advance outstanding at any given time and no advance shall be made to any employee with an outstanding or delinquent account. The advance shall only be made to the individual employee to cover his/her own per diem allowance. Only when an employee is traveling with a group of students, for whom travel expenses are allowed, shall an advance be made to the employee on behalf of the group. The employee is accountable for such advance, including obtaining receipts for all transactions. Study Abroad and Exchange Programs will provide each Faculty Director or Program Leader with a receipt book prior to departure. See [Domestic Group Travel](#) (CWUR 3-50-260) for more information.

A19 Invoice Voucher Form (Advance Funds)

It is very likely that Faculty Directors or Program Leaders will receive advance funds through an A19 Invoice Voucher Form. These funds will be used for any items that could not be paid to the program provider or institution abroad for the group, and will be based on the amount approved in the program budget. Typically, these items include excursions, local transportation, or honoraria. No funds above or beyond the budgeted amounts can be issued.

Faculty Directors and Program Leaders are the cash custodians for university funds and maintains sole responsibility for these funds. Receipts are required for all expenses paid by A19 funds. The sums of money decided upon for the A19 form will be disbursed to Faculty Directors and Program Leaders via check approximately one week prior to departure.

Expense Reports

When the program returns, Faculty Directors and Program Leaders must close their travel authorization by completing and submitting an Expense Report. In the report, directors account for the actual expenses of the program and must provide receipts and supporting documentation. The Travel Desk can work with directors to complete these reports.

Per Diem

Per Diem should be built into the program budget to cover Faculty Directors and Program Leaders' expenses lodging and meal expenses not included in vendor fees. [Federal per diem rates](#) are available through the U.S. State Department. Per Diem rates for [U.S. overseas territories](#), such as Guam or Puerto Rico, are available through the Department of Defense. Consult the Travel Desk for specific information or assistance determining per diem allowances.

Refunds Due to Program Cancellation

The university, Faculty Directors, Program Leaders, and Study Abroad and Exchange Programs reserve the right to cancel the program at any given time without notice. There could be a variety of reasons for this, from terrorism to disease outbreak, or any circumstance that would create a higher risk of student safety. If the University cancels the program, students will be refunded in full or have the opportunity to transfer over to another faculty-directed program if they choose to do so and as space is available. Students are only able to transfer their payments to another program within the same year; finances cannot be carried over to the next academic year.

Appendix A: Program Development Timelines

10 to 12 months

- Draft proposal, budget, itinerary, syllabus
- Consult with OISP/SAEP
- Department, College approval
- Submit proposal to OISP/SAEP
- ISPAC and Provost

8 to 10 months

- Marketing and recruitment
- Coordinate logistics
- Contracts

4 to 5 months

- Collect applications
- Continue with logistics

3 to 4 months

- Close enrollment, finalize roster
- Collect student fees
- Finalize contracts

1 to 2 months

- Travel Authorization
- Invoices
- Course enrollment
- Insurance Enrollment
- Pre-departure orientation

Education Abroad Program Budget

Program title:		
Faculty director(s)	List <u>only</u> faculty with director responsibilities; group leaders with non-director roles should be listed below	
Additional group leader(s)	i.e., name(s) of other CWU employees responsible for the group while abroad (not including faculty directors)	
Number of director/leader(s)	1	i.e., number of faculty directors <u>and</u> group leaders
Host city, country	List <u>all</u> cities and countries to which the group will travel	
Travel dates	i.e., dates the group is abroad, including travel from/to U.S.	
Number of days abroad	1	Includes travel from/to U.S.
Course number(s)		
Number of credits		
Completed by		
Last revised by		
Last revision date		

Individual Student Expenses		Notes & Comments	Grant (yes/no)
Provider fee		i.e., per student fee charged by a third-party provider/partner	
Airfare		Air travel <u>must</u> be arranged through a travel agency (e.g., Wright Travel or Travel Leaders)	
Airfare booking/reservation fee		If applicable	
Lodging			
Meals			
Admissions			
Insurance	\$1.62	International med. insurance (mandatory; \$1.62 per day; effective May 2018)	
Other (specify)		e.g., visa/exit fees, etc.	
Subtotal	\$1.62		
Less outside funding (explain)		e.g., grant funding; only if applied per individual	
SUBTOTAL	\$1.62		

Shared Administrative Expenses		Notes & Comments	Grant (yes/no)
Airfare		Air travel <u>must</u> be arranged through a travel agency (e.g., Wright Travel or Travel Leaders)	
Airfare booking/reservation fee		If applicable	
Transportation to SEA		e.g., shuttle from Ellensburg to SEATAC is \$82 per traveler (rt) (<i>subject to change</i>)	
Group ground transport.		e.g., transportation within host country for excursions and other group travel	
Lodging		i.e., lodging for faculty director(s)	
Per diem (meals)		i.e., based on U.S. State Department per diem rates by country	
Group meals		e.g., group arrival or departure dinners	
Admissions			
Guest lecturers			
Printing/marketing			
Insurance (faculty)	\$1.62	International med. insurance (mandatory; \$1.62 per day; effective May 2018)	
Contingency fund	\$500.00	\$100 per student; minimum of \$500 (mandatory)	
Other (specify)		e.g., phone/internet/banking fees, etc.	
Subtotal	\$501.62		
Less outside funding (explain)		e.g., grant funding; only if applied in-bulk to group or faculty expenses	
SUBTOTAL	\$501.62		

Number of students	10	
Total individual expenses	\$3,016.20	per student
Total shared expenses	\$451.74	per student
TOTAL COST	\$3,467.94	per student
Advertised price	\$3,750.00	Based on 15 students

Additional Student Expenses		Notes & Comments	Grant (yes/no)
CWU service fee	\$75.00	CWU education abroad service fee (mandatory; non-refundable)	N
Passport fees	\$145.00	Based on U.S. State Dept. website	N
Meals (lunches and dinners)	\$400.00	Two meals per day for 10 days at \$10 per meal	N
Tuition	\$804.89	Based on CWU Registrar's webpage	N
Shuttle to SEATAC	\$82.00	Airport shuttle (roundtrip)	N
Personal expenses	\$500.00	At \$50 perday for 10 days	N
	\$0.00		N
SUBTOTAL	\$2,006.89		

Program fee payment schedule		
Fee types	Fee amount	Payment due date
Deposit	\$300.00	Feb. 1
Payment 1	\$1,501.42	Mar. 1
Payment 2	\$1,666.52	Apr. 1
SUBTOTAL	\$3,467.94	

Appendix C: Sample COP (Cost of Participation)

CERTIFICATE OF PARTICIPATION

INSTRUCTIONS: This document has been prepared by Study Abroad & Exchange Programs (SAEP) and is an estimate of the total cost for your upcoming study abroad or exchange program. If you plan to use any sort of financial aid toward your upcoming program, your next step is to schedule an appointment with Inti Valverde in the Financial Aid Office (Barge Hall, Room 115; E-mail: valverde@cwu.edu; Phone: 509-963-3066). During this appointment, Inti will discuss your eligibility for financial aid and the necessary steps you must complete prior to the start of your program. Be sure to bring a copy of this document to your appointment.

NAME OF PARTICIPANT:	See attached student roster	STUDENT ID#:	
Host University:	NA		
Location (City, Country):	Vienna, Austria		
Program Sponsor:	CWU Faculty-Directed Education Abroad Program		
Registration Type:	Remote Credit		

ESTIMATED COST OF ATTENDANCE *

Participation Period	Term 1
Beginning Quarter:	Summer
Ending Quarter:	Summer
Start Date:	7/1/18
End Date:	7/10/18
Estimated Quarter Credits:	4

** Please note that this is only an estimate of the total costs associated with this program; your actual costs may vary according to currency exchange rates and your personal spending habits.*

CWU Costs	Term 1
CWU Application Fee:	\$ 75
CWU Program Fee:	\$ - 0
CWU Service Fee:	\$ - 0
Non-CWU Costs	Term 1
Sponsor Application Fee:	\$ - 0
Sponsor Program Fee:	\$ 3,000
Housing:	\$ - 0
Meals:	\$ 400
Books & Supplies:	\$ - 0
Personal Expenses:	\$ 500
Local Transportation:	\$ 82
Round-Trip Airfare:	\$ - 0
Medical Costs:	\$ 16
Passport & Visa Costs:	\$ 145
Miscellaneous:	\$ - 0
	Term 1
TOTAL ESTIMATED COST:	\$ 4,218

Program Fee Includes:
Includes roundtrip airfare, lodging, in-country transport, excursions/admissions, breakfast daily

Additional Notes:
Payments are due: Feb. 1 (\$300), Mar. 1 (\$1,501.42), and Apr. 1 (\$1,501.42)

TOTAL COST
\$ 4,218

Prepared by M. Zielsdorf
Created on 5/15/18

Appendix D: List of Approved Providers

AIFS (American Institute for Foreign Studies)

Argentina, Australia, China, Costa Rica, Czech Republic, France, Germany, Ireland, Italy, New Zealand, Peru, Russia, South Africa, Spain, United Kingdom

Tel: 800.727.2437

Email: aifspartnerships@aifs.com

Web: <http://www.aifspartnerships.com>

API (Academic Programs International)

Argentina, Australia, Brazil, Chile, China, Costa Rica, Croatia, Cuba, Ecuador, England, France, Germany, Guatemala, Hungary, Italy, Ireland, Mexico, New Zealand, Panama, Peru, Poland, Qatar, Scotland, Spain, South Africa, Thailand, United Arab Emirates

Tel: 512.600.8900 / 800.844.4124

Email: api@apistudyabroad.com

Web: <http://www.apistudyabroad.com/advisors/customized>

Arcadia University, The College of Global Studies

Australia, England, Greece, Ireland, Italy, New Zealand, Scotland, South Africa, Spain, Turkey, Wales

Tel: 866.927.2234

Email: educationabroad@arcadia.edu

Web: <http://studyabroad.arcadia.edu/faculty-advisors/create-a-custom-program>

Athena Study Abroad

Australia, England, Greece, Ireland, Italy, Spain

Tel: 866.922.7623

Email: info@athenaabroad.com

Web: <http://www.athenaabroad.com/advisors/faculty-led-customized-programs>

CAPA (The Centers for Academic Programs Abroad)

Argentina, Australia, China, England, Ireland, Italy, Turkey

Tel: 800.793.0334

Web: <http://capa.org/custom>

CEA Study Abroad

Argentina, Chile, China, Costa Rica, Czech Republic, England, France, Germany, Ireland, Italy, South Africa, Spain

Tel: 480.557.7900

Email: university_support@ceastudyabroad.com

Web: <http://www.ceastudyabroad.com/educators/custom-programs.html>

CET Journeys

Australia, Austria, Belize, Bermuda, Bhutan, Cambodia, China, Costa Rica, Cuba, Czech Republic, Dominica, Ecuador (Galapagos), Egypt, England, Ethiopia, France, Germany, Greece, Guatemala, Hungary, Iceland, Ireland, Israel, Italy, Japan, Jordan, Mongolia, Morocco, Nepal, Netherlands, New Zealand, Norway, Panama, Poland, Portugal, Russia, Spain, Thailand, Tunisia, USA, Vietnam

Tel: 800.225.4262

Email: cet@academic-travel.com

Web: <http://cetacademicprograms.com/custom-programs>

CIEE Study Abroad

Argentina, Australia, Belgium, Bonaire, Botswana, Brazil, Chile, China, Costa Rica, Czech Republic, Dominican Republic, France, Germany, Ghana, Hungary, India, Ireland, Israel, Italy, Japan, Jordan, Mexico, Morocco, Netherlands, Northern Ireland, Peru, Poland, Portugal, Russia, South Africa, South Korea, Spain, Sweden, Taiwan, Tanzania, Thailand, Turkey, United Arab Emirates

Tel: 207.553.4000

Email: studyinfo@cieee.org

Web: <http://www.cieee.org/study-abroad/advisors/custom>

CISabroad

Argentina, Australia, Austria, Bolivia, Brazil, Cambodia, Canada, Chile, China, Costa Rica, Czech Republic, Denmark, Dominica, Dominican Republic, Ecuador, England, Finland, France, Germany, Ghana, Greece, Hawaii, Hungary, Ireland, Israel, Italy, Malaysia, Mexico, Morocco, New Zealand, Netherlands, Norway, Peru, Philippines, Poland, Puerto Rico, Scotland, Singapore, South Africa, Spain, Sweden, Switzerland, Thailand, Turkey, USA, Vietnam

Tel: 877.617.9090

Email: stayloe@cisabroad.com (Scott Tayloe, Director of Customized Faculty-Led Programs)

Web: <http://www.cisabroad.com/customized-programs>

Classport Inc.

Argentina, Austria, Belgium, Belize, Brazil, Bulgaria, Croatia, Czech Republic, Denmark, Ecuador, England, Finland, France, Germany, Greece, Hungary, Ireland, Italy, Luxembourg, Netherlands, Northern Ireland, Norway, Poland, Portugal, Russia, Scotland, Spain, Sweden, Switzerland, Turkey, Wales

Tel: 888.485.0858

Email: info@classportinc.com

Web: <http://classportinc.com/faculty-led-programs>

Hart Travel Partners

Austria, Belize, Brazil, China, Costa Rica, Croatia, Cuba, Czech Republic, Ecuador (Galapagos), France, Germany, Greece, Hungary, Ireland, Italy, Japan, Nepal, Peru, Poland, Portugal, Spain, Switzerland, United Kingdom

Tel: 508.653.2405

Email: info@harttravelpartners.com

Web: <http://harttravelpartners.com/whatwedo.html>

ISA (International Studies Abroad)

Argentina, Australia, Belgium, Brazil, Chile, China, Colombia, Costa Rica, Cuba, Czech Republic, Dominican Republic, England, Fiji, France, Germany, Greece, India, Ireland, Italy, Japan, Jordan, Morocco, New Zealand, Peru, South Africa, South Korea, Spain, Thailand

Tel: 512.480.8866

Email: cp@studiesabroad.com

Web: <http://cp.studiesabroad.com/about>

KEI (Knowledge Exchange Institute)

Argentina, Austria, Belgium, Botswana, China, Colombia, Costa Rica, Ecuador, England, Finland, France, Germany, India, Ireland, Italy, Japan, Kenya, Malaysia, Netherlands, Peru, Philippines, Russia, Scotland, South Africa, Spain, Switzerland, Tanzania, Thailand, Turkey

Tel: 212.931.9953

Email: info@keiabroad.org

Web: <http://www.keiabroad.org/advisors/programs.php>