INTERNATIONAL FACULTY LED PROGRAMS

PROGRAM DESIGN AND OPERATIONS HANDBOOK

EDUCATION ABROAD

OFFICE OF INTERNATIONAL AFFAIRS

EAST HALL 101
# Table of Contents

Contacts .......................................................................................................................................... 6

Education Abroad Contacts....................................................................................................... 6

Select Faculty Contacts ............................................................................................................. 6

Bibliography .................................................................................................................................... 7

Introduction ..................................................................................................................................... 8

Portland State University Internationalization Goals ................................................................. 10

The Faculty Director ..................................................................................................................... 11

Participant Responsibilities............................................................................................................ 13

Program Development ................................................................................................................. 15

Program Design.......................................................................................................................... 15

Incorporating the Location ........................................................................................................... 16

Audience...................................................................................................................................... 17

Program Calendar ....................................................................................................................... 17

Structure.................................................................................................................................... 17

Modular Programs ...................................................................................................................... 18

Selecting Program Dates ............................................................................................................. 19

Length of Time Abroad ............................................................................................................... 19

Determining Credit .................................................................................................................... 20

Class Size.................................................................................................................................. 20

Minimum Number of students ................................................................................................. 21

In-Country Class Activities ........................................................................................................ 21

Post-Travel Class Meetings ....................................................................................................... 21

Partners & Models ..................................................................................................................... 22

Faculty Salary and Load............................................................................................................. 24

In-Load/Course Release............................................................................................................. 24

Summer Wage Agreement ......................................................................................................... 24

Overload.................................................................................................................................... 25
### Table of Contents

- Non-compensatory/Non-Tuition Bearing ................................................................. 26
- Culture ......................................................................................................................... 27
  - Setting Aside Time for Discussions About Culture .............................................. 27
  - The Intercultural Adjustment Cycle ................................................................. 29
- Program Logistics ...................................................................................................... 32
  - Schedule .................................................................................................................. 32
  - Air Travel ................................................................................................................. 33
  - Visas & Passports ................................................................................................. 33
  - Housing .................................................................................................................. 34
  - Ground Transportation ....................................................................................... 34
  - Meals ....................................................................................................................... 35
- Program Proposal and Approval Process ................................................................ 37
  - Developing your Program Proposal .............................................................. 40
  - Developing Your Program Budget ................................................................ 40
    - Faculty and Staff Travel ............................................................................... 42
    - Lodging .............................................................................................................. 42
- Post Approval Outreach ............................................................................................ 45
  - Program Application Packet ........................................................................... 45
  - Program Marketing .................................................................................................. 45
    - Education Abroad Outreach Support ......................................................... 46
    - Discussing Program Cost ........................................................................... 47
- Student Application and Review Process ............................................................... 48
  - Application Deadlines ....................................................................................... 48
  - Low Applications/Enrollments ......................................................................... 49
  - Student Application .............................................................................................. 49
    - Student Interviews .......................................................................................... 50
    - Student Acceptances ...................................................................................... 51
    - Secondary Paperwork ..................................................................................... 51
Table of Contents

Student Pre-Departure Health Concerns ................................................................. 52
Student Scholarships ................................................................................................. 53
Kawase Scholarship ................................................................................................. 53
Pre-Departure ............................................................................................................. 54
Pre-Departure Program Expenses ........................................................................... 54
   Airfare ..................................................................................................................... 54
   Web Payments ........................................................................................................ 56
   Credit Card Payments by Fax ................................................................................ 56
   Wire Transfers and Checks ..................................................................................... 57
   Contracts with Organizations .................................................................................. 57
   Contracting with Individuals: Personal Service Contracts ..................................... 58
Travel Funds ............................................................................................................ 58
   Travel Card ............................................................................................................. 58
   Operating Advance Check ...................................................................................... 59
   Money Handling/Security while overseas ............................................................... 59
Pre-Departure Orientation ....................................................................................... 60
During your Program ............................................................................................... 61
   Alcohol Consumption ......................................................................................... 61
   Cultural Adaptation/Culture Shock ..................................................................... 62
   Illicit Drug Use ..................................................................................................... 62
   Managing STudent/Group Behavior .................................................................. 63
      Discussing Student Behavior ........................................................................ 63
   Sanctioning Students ......................................................................................... 64
   Removing a Student from a Program .................................................................. 64
   Participant Health ............................................................................................... 65
   Program Safety .................................................................................................... 66
   When to Contact Education Abroad ...................................................................... 66
   Documenting Program Expenses ....................................................................... 67
<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tipping</td>
<td>67</td>
</tr>
<tr>
<td>Personal Service Contract Templates</td>
<td>67</td>
</tr>
<tr>
<td>Documenting Exchange Rates</td>
<td>68</td>
</tr>
<tr>
<td>Post Program</td>
<td>69</td>
</tr>
<tr>
<td>Post Program Reconciliation</td>
<td>70</td>
</tr>
<tr>
<td>Appendix I: PSU Travel Policies for Faculty</td>
<td>71</td>
</tr>
<tr>
<td>Appendix II: Program Proposal Template</td>
<td>91</td>
</tr>
<tr>
<td>Appendix III: IFL Budget Template</td>
<td>98</td>
</tr>
<tr>
<td>Appendix IV: Sample IFL Student Application</td>
<td>105</td>
</tr>
<tr>
<td>Appendix V: Sample Behavior Contract</td>
<td>111</td>
</tr>
<tr>
<td>Appendix VI: Emergency Contact Information</td>
<td>112</td>
</tr>
<tr>
<td>When to Contact Education Abroad</td>
<td>112</td>
</tr>
</tbody>
</table>
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SELECT FACULTY CONTACTS

The following faculty have all developed and led IFL programs. They can be invaluable resources in helping you develop your program concept.

- **Kofi Agorsah** ([agorshe@pdx.edu](mailto:agorshe@pdx.edu), 503-725-5080), Africa Studies Capstone: The African Context of the Heritage of Ghana

- **David Banis** ([dbanis@pdx.edu](mailto:dbanis@pdx.edu), 503-725-8903): Sustainability in City and Country in Tuscany, Italy

- **L. Rudolph Barton** ([bartoni@pdx.edu](mailto:bartoni@pdx.edu), 503-725-3339): Architecture in Span

- **Jack Corbett** ([corbettj@pdx.edu](mailto:corbettj@pdx.edu), 503-725-8226): Various programs surrounding Migration, Mexico

- **Celine Fitzmaurice** ([celine@pdx.edu](mailto:celine@pdx.edu), 503-725-8260): U.S. Mexico Border Program, Costa Rica Capstone

- **Marcus Ingle** ([mingle@pdx.edu](mailto:mingle@pdx.edu), 503-725-8202): Development Management in Vietnam

- **Dan Johnson** ([hgdj@pdx.edu](mailto:hgdj@pdx.edu)), **John Rueter** ([rueterj@pdx.edu](mailto:rueterj@pdx.edu), 503-725-3194): Environmental Sustainability in Spain

- **Margaret Neal** ([nealm@pdx.edu](mailto:nealm@pdx.edu), 503-725-5145), **Keren Brown Wilson** (503-725-5148): Global Aging and Health, Nicaragua

- **Sully Taylor** ([Mary.S.Taylor@pdx.edu](mailto:Mary.S.Taylor@pdx.edu), 503-725-3761): School of Business Administration programs in China, France, India, Mexico, and the Middle East

- **Richard White** ([whiter@pdx.edu](mailto:whiter@pdx.edu), 503-725-4046): International Community Development in Nicaragua

- **Dilafruz Williams** ([williamsdi@pdx.edu](mailto:williamsdi@pdx.edu), 503-725-4676): Service-learning in India
BIBLIOGRAPHY

We gratefully acknowledge the following resources used in the development of this handbook:


Since their introduction at Portland State University in the 1994 – 1995 academic year, the popularity of international faculty led (IFL) programs has risen exponentially. Today, almost 50% of PSU students studying abroad are doing so through IFL programs, and more students participate in IFL programs than any other single program model. The trend at PSU mirrors study abroad trends nationally, and tends to be even more pronounced here due to PSU’s largely non-traditional student body.

Why are these programs so popular? The short answer is that these programs essentially turn the world into a classroom. Why study Italian geography in a room in Neuberger Hall, when you can study it first-hand in Tuscany? Why study Chinese business in a PSU lecture hall when you can study it in the Chinese offices of Nike?

IFL programs allow students to study their favorite subjects, in situ, with their favorite faculty member(s); many students, a short-term study abroad program is the only opportunity they may have to incorporate international education into their degree program while at the same time juggling work and family obligations here at home. At the same time, the lower aggregate costs of short-term international programs brings international educational opportunities within reach of more students. IFL programs provide academically rich and personally transformative experiences for a good number of students, many of whom have never been abroad before. Working with students as they experience the wonderment, excitement and understanding of exploring another country, is always an exhilarating experience for faculty, and one that validates all of their hard work in putting the program together.

From a faculty member’s perspective, IFL programs provide exceptional opportunities to combine, teaching, research and experiential learning. At the most basic level, these programs allow the opportunity to develop courses that remove the artificial limitations of a classroom environment and utilize an almost infinite canvas of general setting, multiple site visits, and guest speakers to expand and support course objectives and learning outcomes. Many faculty integrate their programs with ongoing research projects. Some faculty members extend their time abroad either before or after a program in order to conduct research or network with international colleagues. Regardless of the motivation or course design, IFL programs provide faculty with exciting and unique opportunities to connect with, interact with, and challenge highly motivated students.
outside of the classroom environment.

For the university, these programs serve a number of important functions: they capitalize on and extend Portland State University’s already strong community-based learning options; they expand the university’s curriculum by covering course topics that would be difficult or impossible to effectively offer on campus; and when students and faculty return to campus, they potentially help further internationalize the campus dialogue and the university community’s shared sense of global understanding and awareness.

The possibilities with IFL programs are almost limitless, and sometimes it can be difficult to know what approaches and structures might work best for your ideas. Education Abroad is happy to connect you with other faculty who have led IFL programs in the past. These programs are almost always very intensive endeavors both for students and faculty. Veteran faculty members can help you understand the advantages and disadvantages of various options as they might apply in your discipline or prospective host country.

A strong academic focus is the most essential aspect of a successful program. Everyone involved: faculty, students and the university; are making significant investments of time, money and resources and everyone each must be invested in maintaining high academic standards throughout the program. Programs that are perceived to be working vacations or study tours do a disservice to all involved, especially the students who carry the financial burden for themselves and the program faculty.

Fortunately, in freeing faculty and students from the structural, geographic and contextual confines of campus classrooms, these programs provide exceptional opportunities to teach strong, cutting-edge classes. With faculty led programs, it is almost true that if you can dream about it you can do it. In this context, of rich co-curricular resources, setting and meeting high academic standards can be easily achieved with solid reflection, planning and pre-departure work.

Beyond academics, the two primary elements that make up any successful faculty led program are faculty expertise both on the course topic and the location. Topical expertise is easy enough to understand: if a faculty member is leading a program to study traditional architecture in Korea, then they should be an expert on traditional architecture in Korea. Faculty experience and professional contacts in that specific location are also important as faculty directors are will want to arrange a number of guest speakers to provide informed local perspectives and to help provide students with an understanding of the cultural context from which speakers present their cases.

This handbook is intended to help you anticipate and understand the unique aspects of international faculty led programs and to provide some options for planning, working through and overcoming the challenges they pose, so that you and your students can take advantage of the unique opportunities they offer.

All of us in the Office of Education Abroad look forward to working with you and your students on your exciting program.
PORTLAND STATE UNIVERSITY INTERNATIONALIZATION GOALS

INTERNATIONAL VISION

Portland State University's future will be guided by the understanding, belief and commitment that our students will enter the 21st century as leaders in an emerging global community. The University understands that internationalization must become integral to the fabric of everything that we do. The University administration, faculty, academic professionals and staff believe that we must prepare our students to be not only globally aware but also globally active. The University demonstrates, on a daily basis, its firm commitment to our international mission. Through the integrated efforts of the administration, faculty, academic professionals and staff, we will internationalize our culture to the point that international is no longer something added to the university's mission, but is seamlessly woven throughout the fabric of our campus. PSU will provide every PSU student with the highest quality international education possible within the limits of fiscal responsibility.

INTERNATIONALIZATION GOALS, RECOMMENDATIONS AND SHORT-TERM ACTIONS

Goal #1: Increase opportunities for every PSU student to have meaningful contact with other cultures through: (a) our academic curriculum, (b) study abroad opportunities, (c) international students, (d) faculty visiting our campus and (e) all other aspects of the campus environment.

Goal #2: Develop university policies and procedures that encourage leadership and innovation in the creation and delivery of a world class international education.

Goal #3: Increase opportunities for PSU faculty, academic professionals and staff to incorporate international dimensions into their teaching, scholarly agendas, programs and professional development.

Goal #4: Build on Oregon and SW Washington's emerging sense of themselves as places with an international character and critical links with the rest of the world.

Goal #5: Strengthen PSU's ties with its international alumni to develop their support of our international vision and mission.
IFL programs provide a myriad of benefits to both students and faculty. With all of their benefits, it can be easy to overlook the challenges that these unique programs pose. In agreeing to lead a short-term program abroad, faculty directors take on a range of new and challenging tasks and responsibilities, including: program logistics, student health and safety, supporting students’ intercultural adaptation abroad, and being in close and often-intense contact with students on a 24/7 basis for an extended period of time.

In return for all of this hard work, faculty get the true pleasure of watching students stepping out of their own cultural and sociopolitical comfort zones, often for the first time. All of us who have traveled abroad have vivid memories of our first impressions of a new country. As an IFL instructor you’ll get the equally unforgettable opportunity to witness, facilitate and support that experience for students who were like you. After the completion of their program, many faculty comment that this is a joyous role to play, and one that reinvigorates and refreshes their perspective on a country that they have studied for many years.

There are myriad other benefits to you, your students, your department and the university. But it is the students’ excitement that you should focus on to carry you through all of the hard work that lies ahead, for hard work it is. We are here to support and facilitate your work as we are able to do so. However, this is your program conceptually, structurally and academically. Because getting outside of the classroom and taking students to a field experience in another country strips many of the constructs of a classroom based class, you can and should take full advantage of that the situation to work with your students and your topics in a variety of new ways.

You are the key expert on how you want your program to run, what academic concepts are presented, and how; what kind of group dynamic, structures, and work you want to develop; and the ideal mix of class meetings, site visits, guest speakers, and local projects that you want to use. In most cases, you will also be the key expert on your program location, and will have specific ideas concerning logistics, lodging, as well as academic and co-curricular resources. Education Abroad can assist you in most of these areas and can provide some perspectives and ideas based on our experience with students, other faculty, and other locations. Occasionally, you may not have first-hand experience in a specific program country or city; in those cases we can work with you to identify a local organization or individual to provide local knowledge and assist with arrangements.

Our goal is to help make your program successful; however we generally look to you to develop and provide the specific individuals, organizations, and service providers with whom you want to work. In almost all cases, we will defer to your wishes and expertise in
EdKey: structuring the program, unless state/university policies, or relevant prior experience dictate that we work with you to identify alternatives.

EDUCATION ABROAD’S ROLE

Faculty are truly the driving academic and creative forces behind any IFL program. Faculty are best positioned to understand the academic and research needs of their students and departments. Our goal in Education Abroad is to give the faculty support and leeway to develop a broad range of new programs, by providing relevant feedback about logistics, feasibility and risk, to assist in the student selection process and to serve as liaison with the relevant university offices in order to facilitate implementation of the program.

Through the program proposal process, Education Abroad works with you to develop as much information about the academic content and logistics as possible. Our goals are to give the university sufficient understanding to evaluate the feasibility, academic merit, and health and safety factors of a given program and, if the program is approved, to give prospective students as much information about a program both in the pre-application and pre-departure stages.

For each program, we believe that the university and the students need to have as much information as can be reasonably provided. Students should be able to make informed decisions about whether or not a program will meet their needs, standards and goals. It goes without saying that programs change and evolve during the pre-departure phase and, once overseas, program changes will undoubtedly be needed to respond to unanticipated situations and/or developing student needs and interests. Indeed, all program participants, faculty and students, must possess an ability to tolerate uncertainty and flexibility. Even on the most well-planned trip abroad, it is impossible to tell students what will happen every minute of the day or to prepare students for every eventuality. Rather than inhibiting program options, strong up-front planning often provides a solid foundation from which to improvise some sections while maintaining the program’s overall focus and logistics demands.

We approach program development with the understanding that it is neither possible nor desirable to plan every moment of the day or for every contingency. In fact, students will inevitably learn more about the program and the program environment in the first 2 hours after their arrival than they can learn through 2 weeks of pre-departure preparation. Likewise, during that first 2 hour window, faculty will inevitably begin to understand which program components will work well, and which may need to be changed. Similarly, Education Abroad will learn more about how to best support and facilitate your particular program from your first year post-program debrief then than we might from weeks of pre-program discussions and planning.
PARTICIPANT RESPONSIBILITIES

FACULTY DIRECTOR

PROGRAM DEVELOPMENT AND RECRUITMENT

• Gather information about the program from previous directors and students
• Meet with Education Abroad to discuss budget, logistics, and program goals
• Attend Education Abroad budget meetings
• Develop plan for recruitment and promotion, including informational meetings
• Work with Education Abroad staff on finalizing the program budget

ADMISSIONS AND LOGISTICS

• Communicate any program-specific information to students
• Obtain passport, visa(s), and immunizations
• Organize a program-specific orientation and invite Education Abroad staff to cover general information for students
• Submit all invoices to Education Abroad or your department as appropriate

With the assistance of Education Abroad:

• Review applications on a rolling admissions basis and interview applicants
• Book personal airline reservations (follow OUS policies) and make travel recommendations to students
• Make housing arrangements for you and your students
• Order textbooks/ prepare course(s) and notify students of any pre-departure purchases

PRE-DEPARTURE PREPARATION

• Review any travel advances with Education Abroad or your department
• Prepare for on-site financing (PSU travel credit card or operating advance)
• Make arrangements for your house, car, children, and pets
• Make arrangements with your department head for your absence
• Prepare materials to take abroad (student files, course materials, budget information, this handbook)
• Read about culture shock and cultural adjustment

NON-ACADEMIC ON-SITE RESPONSIBILITIES

• Plan an agenda and buy materials for an on-site orientation
• Meet with students to discuss non-academic issues: information about the program city, region and country of the program, cultural adjustment, money issues, emergency response
• Become familiar with and orient students to local-area health care facilities, etc.
• Record expenses and keep all receipts

POST-PROGRAM RESPONSIBILITIES

• Reconcile your travel advance and expenditures on site
• Submit program director’s report

**EDUCATION ABROAD RESPONSIBILITIES**

• Provide this handbook and assist with program development and administration
• Supply all required forms for the establishment of the program, including program proposal packets
• Assist with publicity and promotion of the program
• Produce and edit university-wide website content and other general publicity vehicles
• Coordinate all paperwork associated with student application and secondary paperwork
• Handle all monetary transactions, including collection and disbursement of funds
• Assist in screening applicants, especially for medical, conduct, and other histories
• Issue program acceptances/denials
• Enter student registrations
• Assist with vendor contracts and payments
• Prepare financial aid budget for students, as needed
• Prepare and process Faculty Director travel authorizations and reimbursements
• Assist the Faculty Director with pre-departure orientation sessions
• Approve the program budget and determine the final cost of the program

**STUDENT RESPONSIBILITIES**

• Attend the mandatory pre-departure orientation session(s)
• Complete all pre-departure preparations (paperwork, immunizations, visa, etc.)
• Participate in all scheduled program events and lectures
• Complete all required readings before and during program
• Complete all required course work by the specified deadline(s)
• Additional expectations, as determined by the Faculty Director and the group
PROGRAM DEVELOPMENT

Developing an IFL program takes you to go far beyond the usual realm of course planning. As the program director, you must become part travel-agent, bookkeeper, security officer, and 24-hours student advisor. Nonetheless, you remain first, and foremost, an educator.

The Education Abroad Office will assist you in designing and implementing a safe and well-organized program. As the program faculty, the Education Abroad Office relies on you to ensure that the international program contributes a breadth of knowledge and understanding to a student’s academic program. Together we work to ensure that the program also contributes to enhancing our students’ understanding of other cultures and global perspectives.

When planning your program, it is important to keep in mind that everything is a variable. If you are thinking about a longer period abroad, and may be worried that the lodging costs may make the program too expensive, you may want to take balance that by taking a larger number of students so that the per student cost comes down. Alternately, you might offer some of the content on campus before departure. Similarly, if the costs or logistics of your first plan become too much to effectively manage, think about how you can go into more depth in just one or two cities.

PROGRAM DESIGN

The broad structures of IFL programs vary greatly. In some instances, programs may be hosted at a university abroad with very traditional, classroom-based, course meetings, coupled with some site visits around the city. On the other extreme, far outside of a classroom environment, some programs spend their entire time in remote field stations where participants conduct an archeological dig or ecological research on deforestation. During these programs, class meetings might consist of structured debriefings held at the field site, or back at the program lodgings.

More typically, programs combine many different elements providing experience, contextualization and reflection. A day might begin with a class discussion, followed by presentations by invited guest speakers. The afternoon might include site visits and some less structured periods for students to interact with locals, and free time for everyone to explore on their own and to decompress from busy academic
and group schedules.

Many Portland State IFL programs also contain experiential community-based learning or service-learning activities. Through its highly regarded undergraduate Capstone program, PSU has developed a strong reputation for knowledge and excellence in community-based learning. IFL programs explicitly contain some experientially focused course elements, so community-based learning activities are a natural complement to the programs and to the university’s domestic activities.

**DESTINATIONS WITH STATE DEPARTMENT TRAVEL WARNINGS**

University policy does not specifically prohibit travel to or programs in destinations for which a U.S. State Department Travel Warning is in place. A Travel Warning will carry some weight in determining whether or not a program should be approved or should move forward. However, the university will also weigh the academic benefits of the proposed program to students and faculty. Moreover, the university will look at the specific language of the travel warning to see if it explicitly discusses potential dangers to U.S. citizens or westerners abroad, and whether it applies to the specific program destinations.

The university may also reference travel bulletins from the governments of other countries to evaluate travel warnings and conditions and the assess types and levels of risk that might impact program participants.

**INCORPORATING THE LOCATION**

In planning your program’s subject matter and content, first consider how the location of your program can best complement the course content.

- What relevant academic, professional, and/or cultural site visits, tours, guest speakers, and interviews might be planned?
- What contacts do you and your department have in the host location that could be valuable?
- How well do your academic and research interests align with the course topic? If there are gaps, would it be appropriate to add a co-teacher to the program?
- When you have determined your academic and cultural concentration for the program, begin thinking about the course syllabus design and sequence: readings, discussions, interviews, trips, site visits, assignments and assessments, and/or service-learning components

**HOST COUNTRY LANGUAGE CONSIDERATIONS**

Language is obviously an important program consideration, both in and out of the classroom. If the program does not have a language prerequisite, and most short-term programs do not, providing an introduction to the language and basic survival phrases prior to departure is very helpful.

Students may not gain much functional ability through a brief introduction, but they will feel better having some phrases to try out and tools to work with.
AUDIENCE

The prospective audience for the course is a prime consideration in designing the course. Courses that are too narrowly focused may only appeal to a small number of students on campus. If the resulting applicant pool is too small, the program may not have enough students to go; or the few students who do go may have to pay very high program fees to cover an inordinately high percentage of the total program cost. Alternately, if the course’s scope is too broad, participants may feel that the course doesn’t have sufficient focus and it may be difficult to set high quality academic goals and expectations.

A related challenge arises when the student groups have different academic backgrounds or expectations. For example, undergraduates and graduate students participating in short-term programs often have very different profiles, needs, competencies and expectations. For many undergraduate students, this may be their first time abroad; they may feel that they need a slower introduction to the culture. Graduate students participating in these programs often have a range of international experience; these students may be seasoned travelers who are ready to jump right into things and become frustrated at the group’s slower collective pace. Similarly, both groups may become frustrated with presentations or class discussions that are felt to be too advanced or too basic.

This is not to say that diverse student groups do not work. Rather, a clear course focus contributes to relevant admissions criteria and internally consistent academic expectations. This contributes to shared focus and goals on the program.

PROGRAM CALENDAR

STRUCTURE

There are four structural models for IFL programs:

1. All essential course content delivered during travel. Class assignments delivered on-site and/or in a program wrap-up meeting after travel is completed.

2. Course readings and discussions delivered in a few semi-formal class meetings prior to departure. Class assignments delivered, before, during and/or after travel.

3. Formal class meetings held throughout the preceding term. Travel occurs after that term’s final exam period. Class assignments delivered before, during and/or after travel.
4. International course is part of a full load of related courses offered during a term. Program may travel in the middle part of the term as students will not need to interrupt not program non-program courses.

Most programs incorporate some pre-departure class meetings; and at least one pre-departure class meeting is mandatory. At a minimum, a discussion of program logistics and host country culture is essential. Education Abroad staff will also attend one meeting to brief students on health and safety issues and to discuss cultural adaptation strategies and university conduct policies and expectations. In addition, students who have taken the course in previous years enliven pre-departure meetings by reporting on the academic projects they completed and by providing travel tips.

We strongly encourage you to consider additional pre-departure meetings. These are ideal times to provide students with relevant introductions to the history and culture of the host country, to discuss course projects and research, to complete course readings, and to discuss student expectations and goals as well as your expectations and goals for the program and for the students. The more background and context your students have when they arrive in your host country, the more you will all get out of the program.

When considering the day-to-day course structure and the program’s academic goals, you should work with the expectation that once the program begins everyone will be very busy with the day-to-day program activities. When students are able to receive and reflect on country information and program readings prior to departure, they are able to hit the ground running when they arrive in their host country.

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**MODULAR PROGRAMS**

Some faculty led programs contain separate and distinct courses. One or two courses may be offered on campus prior to the travel dates. The on campus course(s) serve as pre-requisites for the international course. This structure provides faculty with well-structured opportunities to introduce the subject matter, assign readings, and provide background and context for what students will learn during the travel portion.

You may find a modular structure helpful when you have a significant amount of information to impart prior to departure... As one would expect, these pre-departure courses often meet more frequently and allow for more structured and systematic presentation of course concepts, and provide opportunities for assessment via tests, and/or projects.

Regardless of whether or not such a modular structure is used, the goal should be to ensure that students have certain base-line knowledge of the topic and the program logistics prior to departure.
Occasionally, a program will consist of distinct pre-travel, overseas and post-travel courses. Again, the post-travel course provides more structured opportunities for you and the students to process and discuss new knowledge gained during the travel component. After their return to campus, students can then complete additional new research based their new understanding of the course topic and local conditions abroad.

SELECTING PROGRAM DATES

About three quarters of all IFL programs are offered during summer term. This period offers the greatest flexibility for both students and for many faculty. Some programs travel after fall term finals are over, during winter break.

Be sure to take into account the full-final examination schedule for the preceding term, even if your finals will end early. For summer programs, students generally prefer programs that run at the beginning or end of the summer so that they can work or take some classes before or after the program.


Do not forget to check the host country's calendar for popular holidays. Local or regional travel may be more difficult, expensive or even impossible during these periods. In addition, host country staff, guest speakers and prospective site visits may be difficult to arrange during local holidays.

LENGTH OF TIME ABROAD

The length of time abroad obviously determines the amount and level of material that can be included, the number and duration of site visits, guest speakers, the amount of credit awarded, and the general breadth and depth of the inter-cultural interaction that students will experience. At the same time, the length of time abroad is the primary driver of program costs; more days on the road = more housing costs, more transportation, more speakers, etc..

The typical length of IFL programs at PSU is 3-4 weeks, though a small handful are shorter than three weeks, and a few are longer. Factors to consider when deciding on program length include:

- Academic content and goals.
- Cost of international airfare, and amount of time needed for travel. When airfare costs are high and travel times are longer, students tend to want a longer period abroad to offset their investment.
- In-country costs, including housing, meals, local and regional travel, etc.. Programs in countries with a higher cost basis tend to be shorter; programs in countries with a lower cost basis tend to be longer.
We address program logistics and scheduling in greater depth later in this handbook. However, it is worth noting here that you should schedule meaningful time for individual student exploration into your initial course concept. This unstructured time will mean a longer and more expensive program overall, but it is academically important in reinforcing the intercultural nature of the experience and students’ own interests in exploring on their own.

**DETERMINING CREDIT**

Course credit is determined through the standard contact hour formula; that is 10 contact hours = 1 quarter (term) credit, the same as a course taught on campus. Most group program activity with a relevant academic focus may be considered in determining the amount of credit to be awarded, for example, guest lectures, site visits, community based learning projects, and class discussions. These course activities may be counted towards total class contact hours even if they occur in unusual locations, such as a group discussion held on a bus heading to or from a site visit.

Given this broad definition of what constitutes an academic contact hour, you could theoretically design a two week course that promises 8 or more credits. More typically, though, you will determine the number of course credits available based on how much content is covered relative to a similar on-campus course. After a proposal and syllabus is developed, you will submit them to your department for review, and your department will approve the academic content and the appropriate number of credits for the program or refer it back to you for revisions.

**CLASS SIZE**

Estimating the ideal size of the program is an important and often challenging decision. Small groups tend to be more flexible, easier to move around, and the group dynamic and interpersonal relationships can be easier to manage. However, smaller groups tend to have smaller program budgets, so some types of activities may not be feasible.

With larger groups, the fixed program expenses are spread out more, so you are typically able to incorporate more site visits, perhaps visits to multiple cities. Larger groups can be harder to manage, although it is also true that with larger groups it becomes more financial feasible to hire logistics coordinators, bus companies, translators and others who can help take some day-to-day concerns off your shoulders.

Typical programs plan for 10-12 students, some are a bit smaller, and some programs take 25 or more students. Your academic goals for the program, together with your personal preference for working with a larger or smaller group, are the most important factors in deciding on the program size.
Since the per-student program cost will change depending on how many students you plan for and how many actually enroll, we will work with you to develop a program budget that is based on a range of students. To assist us with that, we will ask you to let us know the minimum, maximum and preferred number of students for your program.

**MINIMUM NUMBER OF STUDENTS**

As a general rule, the Education Abroad’s minimum for IFL programs is 8 students. There are two reasons for this. Organizationally, our office takes on almost as much work to coordinate an 8 student program as we would for a 16 student program. From the student’s perspective, smaller group sizes result in wider variations in the program fee as each student carries a larger share of the program’s fixed costs. The per-student cost difference between 8 students on a program or 7 students may be quite large. This lack of predictability often creates budgeting difficulties for students.

Education Abroad may run a program with less than 8 students if the program is supporting or supported by grant activities or partners with students from another program or university on site. Requests for waivers to this policy will be considered on a case by case basis.

**IN-COUNTRY CLASS ACTIVITIES**

With the hectic schedules of guest speakers, visits and class meetings it can be difficult to find time for independent student reading and research. During the course design process, it may be helpful to consider which course activities work well and which may be easier to complete before or after the international component. Typically, students do not have much time to complete significant course readings or document research while abroad, and it is just as likely that you will not have much time for preparation or grading. In addition, library and computer resources overseas are generally not as accessible as those available on campus.

**MANAGING STUDENT EXPECTATIONS**

Students’ positive or negative perceptions of a program stem directly from the expectations they form before the program starts. The majority of students will show a great deal of adaptability and flexibility during a program as long as the program conforms to the broad outline of what they expected to find.

When students display negative attitudes during a program or complete a negative program evaluation after returning from a program, it is often because the program was not as they pictured it.

Program materials, communications and pre-departure meetings that provide accurate and consistent descriptions of both the host country and the program are very useful in helping students develop realistic expectations and to increasing student satisfaction both during and after the program.

**POST-TRAVEL CLASS MEETINGS**

Just as pre-travel class meetings provide time for course components that are difficult to complete while abroad, so too, post-travel class meetings provide time for important course activities.

The most common post-travel class meetings include student research findings and
Presentations. Not surprisingly, many friendships develop among students who have traveled together and have a sense of shared experience. Faculty may also want to set aside time for the group to discuss and reflect on course concepts, cross cultural experiences and impressions and even general socializing. Many faculty members include a pot-luck meal or other social event after student presentations.

De-briefing sessions upon return to campus will assist students in assimilating their program experience into a larger academic context and worldview. You will find that students do quite a bit of processing, learning after they return and have some time to reflect. In addition, reverse culture shock is a very common phenomenon after returning to the United States. The students have just completed an experience that often shifts their understanding of the world, and they may come to see U.S. culture in a dramatically different light. In addition, when students try to describe their experience to friends and family, students soon realize that other people do not understand the importance of their experience. Post-travel class meetings and debriefings are a very important part of the learning process in IFL programs.

**PARTNERS & MODELS**

All IFL programs partner with some local individuals and organizations to a greater or lesser extent. These partners bring a range of host country experience, perspectives and expertise to students. At the most basic level, your contacts and your department’s contacts in the target country can provide advice on logistics, site visits and schedules, as well as prospective guest speakers and related site visits. Moving up the scale, existing PSU partners abroad can offer collaborative faculty, additional related courses, dorm space or homestay arrangements, and more. Finally, there are a number of outside organizations that work in the field of international education and maintain study centers in various countries. These organizations can provide a full range of logistics and academic services.

**FACULTY DIRECTOR OR DEPARTMENTAL PERSONAL/PROFESSIONAL CONTACTS**

- guest speakers,
- itinerary suggestions,
- site visit hosts,
- introductions to local individuals and organizations

**FACULTY DIRECTOR OR DEPARTMENTAL – COMMUNITY ORGANIZATION CONTACTS**

- guest speakers,
- introductions to local individuals and
- site visit hosts,
- itinerary suggestions,
- organizations,
- possibly homestays

### PSU UNIVERSITY PARTNERS ABROAD

- guest speakers,
- collaborating faculty
- classroom space,
- dormitory space,
- site visit hosts,
- language or culture courses,
- other related courses,
- local student “buddies”,
- itinerary suggestions,
- introductions to local individuals and organizations,
- possibly homestays and/or transportation

### THIRD-PARTY PROVIDERS

- guest speakers,
- collaborating faculty
- classroom space,
- dormitory space,
- site visit hosts,
- day-to-day program staff and coordination
- language or culture courses,
- other related courses,
- local student “buddies”,
- itinerary suggestions,
- introductions to local individuals and organizations,
- possibly homestays and/or transportation

International university partners and third-party providers can be wonderful partners because they are based in your target country and they have staff who are experienced in special programs and logistics planning. However, the additional assistance they can provide can tend to increase program costs. This is not to say that contracting for services with universities or service providers abroad is not worth it. On the contrary, these organizations possess a wealth of local knowledge, local contacts and logistical abilities. Contracting for services for faculty led programs can add academic breadth and depth and qualitative logistics improvements to an already strong program proposal. It is also true that even with all of the preparation and hard work that you and the Education Abroad staff may invest in a program, things can go wrong during the program: guest speakers may be late.
or suddenly unavailable or logistics arrangements may fall apart. Local universities and third-party service providers can provide a greater degree of predictability against the inevitable and responsiveness when it the unexpected does occur.

We encourage you to think creatively about your program and to consider what each type of external partner might bring to the program. It is also important to consider the amount of your time that you can dedicate to trip planning and logistics. Education Abroad staff can work with you to research services and benefits that partner universities and third-party organizations can bring to your program and to evaluate the costs and benefits incorporating these partners.

**FACULTY SALARY AND LOAD**

Planning and conducting an IFL program is a lot of work. Beyond the personal satisfaction and rewards that come with these programs, it is natural to ask about financial compensation. Portland State University uses a number of different models, outlined below. You will want to consider which model works best for you and consult with your department chair and/or Education Abroad on the appropriate method.

**IN-LOAD/COURSE RELEASE**

You may talk with your department chair to request that your IFL course be counted as a part of your normal teaching load. Alternately, you might seek departmental funds and approval for a course release to offset the work you are doing on the IFL program. However, you should be aware that because most IFL classes are special topics courses falling outside of your department’s schedule of classes, your department chair may not be able to otherwise cover your normal teaching obligations if they allow you to teach a special topics course as a part of your annual teaching commitment.

**SUMMER WAGE AGREEMENT**

About three-quarters of IFL programs are offered during the summer term to take advantage of the longer travel windows and overall scheduling flexibility. If you are on a nine month appointment, you are eligible to take a wage agreement to cover the teaching load for your summer term IFL course.

For summer IFL courses, the university has agreed to a tuition and wage agreement plan that provides for faculty salary and at the same time provides a lower tuition rate to help offset the program fee and the students’ travel costs. Summer term IFL faculty are paid at the established American Federation of Teacher’s instructor rate regardless of their actual faculty rank. In exchange for accepting a salary rate that may be lower than their on-campus compensation, the university agrees not to seek to retain any profit on
tuition from the class. Instead, the university simply seeks to recover the total costs of faculty salary, benefits and overhead. These costs are divided equally among all of the students in the class, and that is the tuition rate charged.

TABLE 1: SAMPLE SUMMER WAGE SCHEDULE

<table>
<thead>
<tr>
<th>Adjunct Faculty Rate</th>
<th>$33,570.00</th>
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</thead>
<tbody>
<tr>
<td>Multiplier</td>
<td>20%</td>
</tr>
<tr>
<td>OPE Rate</td>
<td>20%</td>
</tr>
<tr>
<td>Overhead</td>
<td>33%</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Number of Credits</th>
<th>Instructor Salary</th>
<th>OPE</th>
<th>Overhead</th>
<th>Total</th>
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</thead>
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<td>$168.00</td>
<td>$277.00</td>
<td>$1,284.00</td>
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<td>$831.00</td>
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<tr>
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<td>$1,008.00</td>
<td>$1,662.00</td>
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<tr>
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<tr>
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<tr>
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<td>$3,047.00</td>
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<tr>
<td>12</td>
<td>$10,071.00</td>
<td>$2,015.00</td>
<td>$3,324.00</td>
<td>$15,410.00</td>
</tr>
</tbody>
</table>

To illustrate, assume you are teaching a six-credit IFL summer term program. Your salary for that class would be $5,036 plus $1,008 in OPE payments, and the university incurs an additional $1,662 in overhead; the total cost is $7,706. If there are twelve students enrolled in the class, then each would pay $642.17 in tuition for those six credits. Each student would pay that amount regardless of their resident/non-resident, undergraduate/graduate status. By comparison, the standard AY0910 tuition charge for six credits is:

<table>
<thead>
<tr>
<th></th>
<th>Resident</th>
<th>Non-Resident</th>
</tr>
</thead>
<tbody>
<tr>
<td>Undergraduate</td>
<td>$709.50</td>
<td>$2,634.00</td>
</tr>
<tr>
<td>Graduate</td>
<td>$1,872</td>
<td>$2,922.00</td>
</tr>
</tbody>
</table>

OVERLOAD

If you are on a twelve month 1.0 FTE appointment, you may be able to secure an overload wage agreement. However, your work on the IFL program must be outside of your position description and your job classification and the overload is subject to review and approval by your home department, Human Resources and the Office of Academic Affairs.
NON-COMPENSATORY/NON-TUITION BEARING

In order to help make these programs more affordable for their students, about one-half of Portland State’s IFL program faculty offer their programs outside of their normal teaching load and do not seek additional compensation or a supplemental wage agreement. In exchange, the university agrees not to charge tuition on that IFL course or courses. Students are still responsible for paying the program fee that covers program logistics and other costs.

These non-tuition bearing programs are often called “zero bill” courses. The academic credits that students earn in these classes are exactly the same as any other credits that they may earn as a part of their degree program. There are two manageable issues that come up in zero bill courses:

1) Zero bill courses are not allocated classroom space as a part of the normal room allocation process. If the zero bill IFL class only has a few meetings on campus prior to departure, typically your home department will be able to schedule some space on an ad hoc basis. If your class has regular on-campus meetings prior to departure you can work with your department and/or Education Abroad to identify possible space options.

2) Zero bill courses are not counted in establishing eligibility for domestic health insurance coverage from the Center for Student Health and Counseling (SHAC). Students must pay an additional fee to SHAC to qualify for domestic insurance coverage. The credits DO count towards establishing full-time credit in all other respects.
Successful programs incorporate opportunities for intercultural learning in order to capitalize on the international location. For many students, these programs are their first significant trip abroad. Students on all programs will look for and look forward to opportunities to experience the local culture; this is true even on science programs that take place in a lab or research station.

As the course progresses, students will ideally begin developing skills for understanding and navigating their host culture. The program syllabus and itinerary should incorporate time for structured intercultural exposure; independent, course-related interactions with host nationals; and free exploration and discovery.

It is commonly accepted that students from all academic disciplines will benefit from some international and intercultural awareness. Even the brief intercultural introductions in IFL programs go a long way in helping students develop a more sophisticated world view that allow them to approach communication, conflict and interpersonal relations from a cultural perspective.

On any overseas program, the students and instructor will bump into the foreign culture on a daily basis. Creating genuine intercultural learning opportunities, on the other hand, can be a significant challenge and only occurs with advance planning. Possible approaches include:

- Home stays with local families or dorm stays with local students.
- “Buddy Programs” that include regular meetings or activities with peers from the other culture.
- Observation of, or participation in, activities typical of the culture, including: utilizing public transportation, grocery shopping, religious services, sports events, music or theater performances, and local celebrations and holidays.
- Briefings prior to site visits that include information on cultural traits and mannerisms such as work habits, greetings, introductions, national approaches to religion, politics, environmental issues, family and privacy, the environment, etc..
- Guided activity sheets that require students to participate, observe, and then comment on cross-cultural differences and similarities.

**SETTING ASIDE TIME FOR DISCUSSIONS ABOUT CULTURE**

IFL programs are “foreign” programs both literally and figuratively. All program participants will respond to the intercultural differences in different ways and at different paces, this is known as the cultural adjustment cycle or “culture shock”. Some students will look for any opportunity to immerse themselves in the local culture, and they may express a feeling that the program structure and pace are overly confining. For others, the foreign environment, even on these short-term programs, will be unsettling. This discomfort may manifest itself in various ways; students may become reclusive,
agitated, and disruptive, or may express negative comments directed at the country, local inhabitants, or the program.

Regardless of whether the course is about sociology or science, it is important to include time for activities and discussions focusing on intercultural topics. Daily briefing and debriefing sessions are very important in helping students process their intercultural experience and impressions. Both you and the students, play equally important roles in these discussions. Your knowledge about the host country and experience as an international traveler makes you a key resource in providing students with a better understanding of what they see and experience.

When students do not have time to share their positive and negative impressions in a facilitated group setting, they tend to complain regularly to their fellow students, or to withdraw, physically or mentally, from program activities. Regular group discussions focused around the students' intercultural experience can provide you with an important understanding of whether the students are on-track or whether it may be appropriate to relax or otherwise modify the original schedule to respond to the needs of the group.

Regular group discussions throughout the program are the most effective way to help maintain an effective program focus and a positive group dynamic. While it is important that program itineraries build in time for these facilitated dialogues, the setting does not have to be formal; productive discussions may be held in a hotel lobby or on a bus on the way to a site visit.

Directed journals are also useful for facilitating students' intercultural understanding and adaptation. To be most effective, both as a tool for assessing intercultural adaptation and understanding of course concepts, you should provide one or two relevant questions for each day's journal entry. It is helpful for you to collect and review student journals on a regular basis during the program. In this way, you are able to provide one-on-one feedback to students, especially if students are struggling with academic concepts or intercultural issues and are hesitant to raise questions in front of their peers.
As people move from one society to another and begin to deal with cultural differences, experience has shown that there are specific stages that they encounter in their adjustment process. Indeed, it would be amazing if people could leave their communities, their families, and their homes and go abroad for a period of time without feeling some anxiety. The severity and length of adjustment and the number of adjustment phases that a person will go through depends upon the length of time that he will be away from home and the support he is given. Nevertheless, regardless of how short the time a person is a foreign visitor, you can be relatively certain that he will feel many of the emotions outlined in the intercultural adjustment cycle in the figure below.

This cycle describes a long-term adjustment process - usually over a one-year period. Even if you are involved in a program that hosts people on a short-term basis, it is still important to recognize the dynamics of this process, because research has shown that the same basic pattern will occur, though perhaps less severely in a short-term visit. The human psyche adjusts itself to the time it has available. In most cases, the visitor will experience a dip in Stage 3, about one-third of the way through his experience, and another dip in Stage 5, about two-thirds of the way through. The extent, depth, and length of these dips will depend on the amount of support the visitor receives from people around him and the degree that he can be helped to understand the reasons for his feelings of frustration and concern.

Application Anxiety. When waiting for an opportunity to go abroad, people experience anxiety over their chances of selection and their ability to handle their new opportunity. During this time many anticipate cultural differences but have only a superficial awareness of potential adjustment problems.

Selection/Arrival Fascination. When a person hears that he will be going abroad, he experiences tremendous elation. This excitement continues (with some small exception just before departure, when anxiety may crop up again) until sometime after the individual arrives in the foreign country. During this stage, expectations for the visit are high and the pre-departure proceedings, as well as the arrival introductions, are overwhelming and blissful in their newness. Especially on arrival, the visitor tends to be the focus of attention and activity. He is shown respect and concern that he may seldom receive in his own home community.
Initial Culture Shock. The initial fascination, along with the rounds of introductions and parties, will soon fade for a visitor who is remaining in a community over a period of time, especially for periods as long as six months or a year. Even with visitors coming to the United States on tour, or for Americans going abroad for a similar experience, the novelty of a foreign culture wears off after a few weeks and most people enter a period of decline, known as initial culture shock. Characteristics of this period are possible changes in sleeping habits, disorientation about how to work with and relate to others, and language difficulties and mental fatigue from speaking and listening to a foreign language all day.

Surface Adjustment. After this initial "down," that usually does not last more than a few days to a few weeks, an adjustment takes place. The visitor settles into the situation around him. His language improves, so that he can communicate basic ideas and feelings without fatigue, and he learns how to navigate within a small group of friends and associates.

Mental Isolation. At some point, however, the novelty wears off completely and the difficulties remain. Frustration increases, and a new and more pervasive sense of isolation can set in. Many times, this period is accompanied by boredom and a lack of motivation as the individual feels little stimulus to overcome the deeper and more troublesome difficulties he may be facing. There may be unresolved conflicts with friends, hosts, or peers, or basic language problems that continue to cause difficulty long after initial language adjustment.

Integration/Acceptance. When the visitor is finally at ease with his professional or school interests, as well as with language, friends, and associates, he is able to examine more carefully the new society in which he is living. Deeper differences between him and others become understandable, and he finds ways of dealing with these differences. He may complain of the lack of true friendships, but he has come to recognize that this may not be deliberate on the part of his associates. Eventually, he becomes more integrated into his surroundings and comes to accept both his situation and himself in it. Acceptance of these two realities will allow him to relax and feel at home in his new surroundings.

Return Anxiety. Once a person is well settled in, the thought of leaving familiar friends, faces, and his new community raises anxieties similar to those the visitor felt during Stage 1, before his departure. He begins to sense how much he has changed because of his experience, and apprehension grows at the thought of leaving and returning home to people who will not understand him and his new feelings. He may even feel guilty for wanting to stay and not return home, because he knows that there will be many people waiting for him.

This is a time of great confusion and considerable difficulty. If the visitor has come from a great distance there is the fear that the friendships formed may never be experienced again. This can be a period of great pain. But the greater the pain, the deeper was the experience, and over time, the more lasting may be the benefits.

Shock/Reintegration. Once the former visitor is back home, the contrast of old and new may come as a shock. He will probably have changed a great deal while away, and it will be difficult for family and friends to accept many of the changes. Likewise, having been the center of attention in another country for a period of time, the returnee will be forced after a few days to realize that he has lost his glamour. He then faces the problem of adjusting to being one of the crowd again, while longing for the friends he has left.

He often finds that no one is as interested in the details of his stay abroad as he would like. He experiences conflicts in readjusting to family members and old friends, and is frustrated by his
inability to describe adequately the depth and nature of his life abroad. All of this makes his surroundings even more depressing.

Final resolution of this stage involves a shift in perspective and an understanding of one's own society and one's future development. The returnee must begin to become involved in new activities at home and to plan a life that is built upon the future, rather than the past. Once this is achieved, he or she will be able to integrate the experiences and learning of the recent past and be productive in his "new" old life.
PROGRAM LOGISTICS

Program logistics are all of the “pesky”—but critical—outside of the classroom details that take a lot of planning and work and will make or break any field experience irrespective of the quality of the academic content. Logistics include: passports and visa, international and intra-country flights, ground transportation, housing, and meals as well as the structure of the day-to-day schedule.

You should think about which items to include in as part of the group’s logistics and budget and which items the students might be individually responsible for paying themselves onsite. Generally, any item that is a structured group activity would be included in the program planning and budget. So, for a visit to a temple, you will want to think about transportation, entrance fees, and group meals along the way. It may be tempting to have students pay for their entrance fees and meals out of pocket. However, we would encourage you to include these items in your program budget. This will help you avoid situations where a student didn’t bring as much walking around money as they should have due to poor financial planning or unexpected pre-departure expenses.

INTERNATIONALIZATION MINI-GRAINS

The PSU Internationalization Council offers internationalization mini-grants to support activities by faculty, academic professionals and staff working to incorporate international dimensions into their teaching, scholarly agendas, programs and professional development. Awards are typically in the range of $1000.

Mini-grant awards may be used to support IFL programs by funding a program planning scouting trip, or offsetting faculty travel costs during the actual program.

Additional information about Internationalization Mini-Grants can be found on-line at: http://oia.pdx.edu/intl_council/mini-grants/.

SCHEDULE

You undoubtedly have a rough outline of what you want to do and in what sequence. Here are some factors to consider as you start to put that schedule down on paper:

- Build in regular times for class briefings (before guest speakers or site visits) and debriefings.
- Allow ample time for travel, including time for the students to gather. Remember larger groups will take longer to get organized.
- If your program is set in a relatively remote location, you may want to consider including a day or two of orientation in the city. This can help the students acclimatize and gives them a chance to get their bearings before heading off to a more isolated site.
- For multi-week programs, build in some free days to give students (and yourself) a chance to escape from the group, explore on their own, and decompress.
- Avoid travel itineraries that contain a number of long-distance bus or train trips. Try to pick program centers that have many relevant visits and activities within a reasonable distance.
• Assign course readings prior to departure. Students are unlikely to have the time or energy for significant course readings in the evenings while they are in the host country.

• Develop a short-list of optional activities, so that if the group finds themselves with some extra time on their hands, you have some ready ideas of relevant visits.

During the early planning stages, you may find it helpful to take a relatively conservative approach to scheduling, leaving unscheduled blocks of time for group debriefing, providing additional time for group travel to and from site visits, and allowing free time some free time.

AIR TRAVEL

All IFL programs involve some air travel. Students are responsible for purchasing their own airline tickets. We do not include student airfare in the program budgets and fees charged to students. Many students choose to travel independently either before or after a program, and it is extremely difficult and time-consuming for PSU staff to coordinate each student’s individual travel needs.

As an alternative, you may decide to work with a travel agent to reserve a block of seats on a group flight. Students may then decide to purchase one of the reserved seats or to make their own arrangements. The Office of Education Abroad does not permit faculty to receive free airfare from a travel agent as a reward for booking a certain number of seats. Students should retain the option of purchasing their own itinerary.

You will probably decide to provide students with a location in the host city, typically a hotel, at which to meet by a certain date and time. If the arrival airport is a busy one or the logistics involved in getting to the hotel are more complex, then you may decide to have students meet at the airport on a certain date or time so you can meet them and the group can travel into town together.

After your program enrollments are confirmed, Education Abroad will work with you to secure your airline tickets (see Airfare, page 42).

VISAS & PASSPORTS

Chances are that you have personally traveled to your host country before. You likely have some sense of the visa regulations and procedures. Since the students are not enrolling in universities in the host country—even if classes may meet at a university—participants generally travel on tourist visas, not student visas. This usually makes the process much easier. We will work with you to research any remaining questions about visa procedures for you and your students. However, both you and the students are responsible for securing your own visas.

INTERNATIONAL STUDENTS

Degree seeking international PSU students are certainly welcome to participate in international education programs. Their participation always brings a wonderful diversity of perspective and experience to complement the experience. The Education Abroad advisor for your program will put international students in touch with the appropriate International Student advisor who will help ensure that the student has all of the requisite travel paperwork consistent with their U.S. visa type and status.
Similarly, for students who may need passports, we can provide general contact information and advice; however, participants are responsible for getting and maintaining a current, valid passport.

**HOUSING**

There are many different housing options for your program, such as: partner university dorms, hostels, hotels, and furnished apartment rentals. Housing costs, comfort and location are all critical factors in selecting the right place.

Housing costs for you and your students can easily make or break a program budget. If your per person daily housing cost is $40/night for a 14 night program, then each person is paying $560 for housing. If the per person cost goes to $50, then you have immediately added $140/person, plus additional university overhead, to the program fee. Most programs plan on double-occupancy rooms, though a few use singles and a few use triples.

In thinking about housing for your program, it is helpful to recognize that cheaper is not always better. At the end of a long day of class, site visits, or traveling around, you and your students will want to come back to a place that is clean and reasonably comfortable. In addition, it is sometimes difficult to confirm arrangements and make pre-payments to the very cheapest hotels.

**GROUND TRANSPORTATION**

There are almost as many answers to the question of ground transportation as there are modes of transportation. Mass transit, taxis, mini-buses, rented mini-vans, chauffeured buses, trains or even horses. What works best for you will be determined both by your program focus, daily itinerary and, perhaps most importantly, your group size.

For small to medium sized groups (8-12 students), taxis may be the easiest way to get around town. Taxis offer good flexibility both in terms of time of departure and in destination. For larger groups, a chauffeured bus may be the way to go. If you are judicious in their use and do not schedule a bus that is bigger than you need, these can be a cost-effective option and one that saves you from the hassle of having to round up a group of cabs. The other nice thing about buses is that a bus trip offers a good time to hold an informal class discussion or debriefing.
Renting mini-vans, and using faculty or staff drivers, works really well when you are based at a place outside of town, and need to be able to get the group out and about with some flexibility. Some programs have rented mini-vans for intra-city travel when they have a number of stops to make along the way. The challenge with that is that if you have eight students and a faculty member in a mini-van, you may not have enough space for everyone’s luggage. Intra-city travel with rented mini-vans works better if you have a large enough group, and two faculty members, so you can take two vans. **Note:** Portland State University prohibits students from driving vehicles rented with university funds.

### DRIVING OVERSEAS

In some instances, programs require a faculty leader to drive students from place to place. Faculty need to obtain an international driving license, which can be done easily at a local AAA office. See AAA’s website at: [http://www.aaaorid.com/travel/travel_international.asp#international](http://www.aaaorid.com/travel/travel_international.asp#international) for further details.

When renting a vehicle, faculty leaders should charge the full rental fee to their PSU travel credit card so that they have the Collision Damage Waiver (CDW) insurance. As a result, they can decline the optional CDW insurance offered them by the rental agency. When arranging for a vehicle rental, work with a staff member from the PSU Education Abroad office. Check to ensure that additional insurance is not required in the country of rental. **At no time should graduate assistants or students be allowed to drive the vehicles.** Where feasible, it is preferred that you contract with a company that can hire a professional driver to accompany the vehicle at all times. However, in cases where this is cost-prohibitive, PSU faculty are allowed to drive.

### MEALS

Most programs provide some group meals. There are likely to be a number of occasions during your program where it makes sense for everyone to eat together at the same place, and it is simpler for all concerned to have one check and to pay for the meal from program funds. Not only do the group meals make sense logistically, but they are great opportunities for checking in with the students, and having informal class discussions.

You will want to consider whether or not to plan and pay for all of the program meals. Meal times can be a great time for everyone to unwind and relax. The students will likely want to break up into small groups and go try different places depending on their tastes. By the same token, you will likely enjoy some time away from the full group of students to relax yourself. Faculty who take all of their meals with the students often report that it gets tiring and sometimes turns into a negative experience for both.
PROGRAM PROPOSAL AND APPROVAL PROCESS

By this point, you probably have some good ideas about the content and structure of your program. This section discusses the university’s formal program proposal and review process.

The proposal and review process for international faculty led programs has two steps.

**Academic Review**

Faculty are first asked to provide information about the academic content of the proposed program and the course structures and activities (whether on-campus or abroad) as they relate to the academic content. This proposal will be reviewed by the International Faculty Led Program review committee, a group of faculty with experience and interest in developing and leading these programs. The committee’s focus is 1) to ensure consistently high academic standards across all international faculty led programs and 2) to ensure that the program’s international setting is adequately incorporated into the course structure in support of the learning outcomes.

**Education Abroad Review**

After a program has been approved by the committee, proposing faculty will submit materials detailing the program schedule, logistics, contracting needs, costs and risk to the Office of Education Abroad. Education Abroad’s review focuses on a program’s logistical feasibility, cost, health/safety, or other non-academic factors.

If both the faculty committee and Education Abroad approve the program, Education Abroad will use the materials from both submissions to develop an information and application packet for students and begin program outreach and marketing.

**Due Dates**

<table>
<thead>
<tr>
<th>Review/Program Dates \ Term</th>
<th>Summer</th>
<th>Fall</th>
<th>Winter</th>
<th>Spring</th>
</tr>
</thead>
<tbody>
<tr>
<td>Academic Submission Due</td>
<td>November 1</td>
<td>December 30</td>
<td>May 1</td>
<td>October 1</td>
</tr>
<tr>
<td>Review Decision by</td>
<td>November 15</td>
<td>January 21</td>
<td>May 21</td>
<td>October 15</td>
</tr>
<tr>
<td>Schedule and Logistics Due</td>
<td>December 15</td>
<td>February 28</td>
<td>June 15</td>
<td>November 15</td>
</tr>
<tr>
<td>Student Application Deadline</td>
<td>March 26</td>
<td>July 2</td>
<td>October 8</td>
<td>January 21</td>
</tr>
<tr>
<td>Earliest Program</td>
<td>June 10</td>
<td>September 26</td>
<td>January 3</td>
<td>March 28</td>
</tr>
</tbody>
</table>
PSU Campus-Wide Internationalization Learning Outcome

*Please reference these learning outcomes in section 3 of the attached form. Students will understand the richness and challenge of world cultures and the effects of globalization, and will develop skills and attitudes to function as “global citizens.”*

**International Learning Outcomes (DRAFT)**

**Knowledge:**

K. 1 Demonstrates knowledge of global issues, processes, trends and systems (e.g. economic and political interdependency among nations; environmental-cultural interaction; global governance bodies).

K. 2 Demonstrates an understanding of his/her culture in global and comparative context—that is, recognizes that his/her culture is one of many diverse cultures and that alternative perceptions and behaviors may be based in cultural differences.

K. 3 Demonstrates an understanding of how his/her field (academic/professional) is viewed and practiced in different international contexts.

**Skills:**

S. 1 Uses diverse cultural perspectives and frames of reference to think critically and solve problems.

S. 2 Uses information from other languages and other cultures: to enhance learning in other academic areas; as a window to cultural understanding; or to enhance language and cultural knowledge

S. 3 Interprets issues and situations from more than one cultural perspective.

**Attitudes:**

A. 1 Can articulate differences among cultures; demonstrates tolerance for diverse viewpoints that emerge from these differences.

A. 2 Demonstrates an ongoing willingness to seek out international or intercultural opportunities.
The table below lists the recommended timeline for IFL program proposals and implementation.

<table>
<thead>
<tr>
<th>Time Period</th>
<th>Task Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 year prior to program</td>
<td>Meet with Education Abroad Faculty led Programs Coordinator to discuss program proposal</td>
</tr>
<tr>
<td>10 months prior</td>
<td>Application to Department for approval*</td>
</tr>
<tr>
<td>9 months prior</td>
<td>Approved application to PSU Education Abroad Office</td>
</tr>
<tr>
<td>6 months prior</td>
<td>Marketing plan determined &amp; activated</td>
</tr>
<tr>
<td>4 months prior</td>
<td>All students interviewed and selected for participation in program</td>
</tr>
<tr>
<td>1 month prior</td>
<td>Mandatory Pre-Departure Orientation</td>
</tr>
<tr>
<td>2 weeks after return</td>
<td>All financial documents (receipts, etc.) submitted to PSU Education Abroad Office. Submit student evaluations.</td>
</tr>
<tr>
<td>1 month after return</td>
<td>Submit final program report (including at least one group photo). Hold debriefing meeting for all program participants on-campus.</td>
</tr>
</tbody>
</table>

* Departmental approval is required for international faculty led programs. As in all course offerings at PSU, the programs are offerings of academic departments, not individual faculty. Final acceptance is based on approval and recommendations from the PSU Education Abroad Office and the Internationalization Council.
DEVELOPING YOUR PROGRAM PROPOSAL

Before you announce your program to students or begin making any concrete preparations for the program, you must submit a formal proposal and budget to Education Abroad. The Education Abroad proposal and budget templates may look intimidating, but they are intended to help you think through the academic, structure, logistics, student selection, cost and administrative needs of your program.

For the program proposal narrative, we have found that faculty will have answers to most of the narrative pieces already in mind or contained in other documents they have already written. The program budget template is simply an extension of the information in the narrative. Faculty have told us that it typically takes them 2-3 hours to complete the narrative and an hour or so to complete the budget.

Tips for working with the program proposal and budget templates

As you work through these documents, it can be helpful to keep in mind two things. For the narrative submission, “No”, “None”, and “Not Applicable” may be valid responses. And when putting the budget submission together, make the budget template work for you. The fields that we list are provided as prompts for you. If your program doesn’t have those items, or you think of them in other ways, feel free to replace the name or structure of a given line item with something that you will understand when you look at the budget again 2 months later.

DEVELOPING YOUR PROGRAM BUDGET

Many faculty members find program budgeting and financials one of the most challenging aspects of developing their program, but it really does not have to be a frustrating exercise. Our shared goal is to develop cost estimates for each of the program items. We do not need

PROGRAM BILLING COMPONENTS

Education Abroad always bills students for at least two program cost components. Students will pay a program fee that covers program logistics, supplies, travel and insurance, etc. They will also pay a department fee charged by Education Abroad. Depending on the faculty salary structure outlined in Faculty Salary and Load, students may also pay tuition.
the exact cost for each item. A conservative approximation is just fine.

If you are using a service provider, whether it is a partner university or an external service agency, they will provide a detailed cost estimate and a final contract price to you. The partner university or agency then takes responsibility for any price increases. Pricing simplicity and cost assurance, not to mention the time you save in having to book arrangements, are major advantages of using program partners.

For costs that you are researching yourself, an hour or two of thought and on-line research can usually provide solid estimates. **When estimating prices, be conservative but realistic.** Also recognize that Education Abroad builds in a 3% contingency fund in each program budget. The contingency fund can help to offset cost increases and exchange rate fluctuations that may occur.

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**BALANCING PRICE, QUALITY AND SERVICE**

As educators, we are all aware of the significant costs of a college education, and know that many of our students work on shoestring budgets or face significant financial aid debt. We all feel an obligation to offer meaningful international educational opportunities that students can afford.

Even with our students' financial realities clearly in mind, we should recognize that cheapest is not always best. Students have definite expectations of baseline accommodations and arrangements, even when they are traveling in a third world country. Students also understand that an international program will likely cost more than staying on campus, and in large part they are willing to pay a higher amount.

Students may be attracted to a program in part because of its low cost. However, if the hotel is shoddy, and the group is traveling third class on trains, the students are likely to quickly loose the ability and desire to focus on what you are trying to teach them. Equally, service providers may charge more if they do a lot of work with international groups, but they will also have a better understanding of the needs of international visitors and may have more experience working with international contracts and financial transfers.

**Experience has shown that we shouldn't try to offer the cheapest program available. We should always manage program costs in a manner that results in a high quality educational experience at a responsible and realistic cost.**
FACULTY AND STAFF TRAVEL

Your program related travel, lodging and incidental expenses are legitimate university business expenses and are reimbursable. These costs should be estimated and included in your program budget.

PSU has a number of specific policies that govern employee travel. We will attempt to inform or remind you of the most applicable policies. However, we expect that you will make an effort to review and make yourself aware of PSU travel policies that govern your participation in this international program. A copy of the university’s travel policies, current as of September 2009, can be found in Appendix I. The current travel policy, including any changes and updates, can be found online at: http://www.pdx.edu/bao/forms/policies.

AIRFARE

Your budget should include an estimate of your airfare costs. Later in this handbook, we discuss the specific process for purchasing your airfare. For planning purposes, it is typically sufficient to get 2-3 quotes and use those to estimate the amount in your budget.

GUESTS ACCOMPANYING FACULTY LEADERS OVERSEAS

In general we do not allow a spouse, partner, or significant other to accompany a faculty leader on an IFL program. Because of the intense nature of these programs, faculty leaders are encouraged to spend time with the students and not with a guest. If faculty leaders are doing a good job, they will not have the time or energy to spend with a guest.

If you believe that your program structure would not preclude you from bringing a guest, please contact us so that we can discuss the specific situation.

LODGING

In most cases, faculty and students stay in the same lodging during IFL programs. This makes for easier logistics, and group meetings and general communication. You are not required to stay in the same location as your students. In some cases, such as homestays, it simply is not feasible to stay in the same place. In other cases you may prefer to have some space to allow yourself and your students a little more “down time.”
If you are planning to lodge in the same location as your students, please see the section on Group Lodging.

If you are planning separate lodging, or need lodging on program related activities before or after a program, the maximum amount allowed for daily lodging is dictated by the U.S. State Department Foreign Per Diem rate (http://aoprals.state.gov/web920/per_diem.asp) for any given country and city.

When planning your lodging, look for properties that can be booked via credit card either online or by fax. We can then pay for your lodging using the Education Abroad departmental credit card. If you can not find a suitable property that can be pre-paid, we can include lodging funds in your program operating advance or the program’s PSU travel card.

### LODGING RECEIPTS

Portland State University requires faculty and staff to submit receipts documenting both charges and payment in order to receive reimbursement for qualified lodging expenses.

### MEALS AND INCIDENTAL EXPENSES

During your program travel, you are also eligible to receive reimbursement for meals and incidental (M&I) expenses. The standard Portland State University policy says that faculty and staff are eligible to claim reimbursement for M&I expenses up to the amount set by the U.S. State Department Foreign Per Diem. However, in order to help keep student program costs low, and because many of the typical M&I travel expenses (e.g. ground transportation, entrance fees, some meals, etc.) are likely covered by specific line items within the program budget, Education Abroad limits M&I expense to one-half of the stated U.S. State Department rate. To illustrate this, assume you are leading a 21 day program to Mexico City. The State Department M&I expense rate for Mexico City is $95; over 21 days, the total allowable M&I expense would be $1,995. If there are 10 students in the program, then the M&I reimbursement alone would add about $200 to each student’s program fee. This limitation is not intended to put you in a position where you have to pay for legitimate travel expenses out of your own pocket. If you feel that given your program destination or structure you may need a larger M&I budget, you may submit a written detailed request to Education Abroad for review.

Unlike lodging expenses, the University does not require faculty and staff to submit receipts to document M&I expenses. When you submit your program receipts for reconciliation, simply include a memo requesting payment of the appropriate amount of your M&I per diem budget.
GIFTS

PSU and State of Oregon financial policies prohibit spending state funds on gifts. Obviously, the exchange of small gifts is an important social custom in many other countries, and it may be particularly appropriate for you to bring small gifts to give to guest speakers, host organizations and others. Often times, gifts can be paid for from your per diem meals and incidental funds as the business office does not require receipts for expenses charged to this line item.
POST APPROVAL OUTREACH

PROGRAM APPLICATION PACKET

Once the program is fully approved, Education Abroad will put together a draft program application & information packet as well as a marketing flier for your review. The program application & information packet is intended to be the definitive resource for students who are considering your program. Our goals are to provide as much information to students as possible so that they have realistic expectations about the program and also to help them understand PSU study abroad processes, requirements and deadlines.

PROGRAM MARKETING

Once your program is approved, the program marketing and outreach can begin in earnest. Program outreach is one of the most challenging and likely one of the most important parts of running a successful IFL program. As noted in the introduction, IFL programs have a strong appeal to non-traditional students who may have work and family obligations that prevent them going abroad for a longer period. These same factors mean that non-traditional students spend less time on campus than a “traditional” student, so it is very difficult to spread the word about your program to the very students who may be most interested. In addition, unlike traditional study abroad programs, that are offered continually and build recognition with students and faculty over time, IFL programs come and go and may or may not come back. The final challenge is that the period of time between program approval and a realistic application deadline may only be a couple of months, or even less.

It is difficult to overestimate the potential impact of these challenges on your program. Simply put, more outreach means more students will apply. Larger applicant pools mean that you may be able to be more selective in admitting students to your program, admitting students with higher GPAs, or skills and personalities that will lend themselves to the type of group dynamic that you are trying to create.

Larger applicant pools also mean that it is easier to ensure that the program will have enough students to be financially viable. We often run into a problem where a program is one or two students shy of the minimum number of participants; then everyone is scrambling to see if we can encourage additional students to apply. Meanwhile, the students who applied at the earliest possible date are left wondering if the program is going to go or not, – whether they should go ahead and request time off of work, etc.. This type of scramble for one or two additional applicants is stressful for everyone involved, and often results in a last-
minute application from a student who is only marginally interested in or qualified for a given program.

Finally, and perhaps most importantly to your students, the more students that participate in your program, the lower the per student program fee for everyone enrolled.

After you approve the program application & information packet and the marketing flier, we will post the program on the Education Abroad website (http://EducationAbroad.pdx.edu/ea/), and start distributing fliers around campus.

**SUGGESTED PROGRAM OUTREACH ACTIVITIES FOR FACULTY, INCLUDE:**
- Talking about your program in all of your current classes. Students who have taken or are taking a class from you are the most likely to be interested in your program focus and in working with you abroad.
- Visiting other classes in your department to talk with students about your program
- Asking faculty colleagues to talk about the class or distribute materials
- Sending program information to departmental e-mail lists
- Hanging program posters outside of your office door and in the department office
- Distributing program information to any related student clubs or organizations

**EDUCATION ABROAD OUTREACH SUPPORT**

Education Abroad is available to assist you with program marketing. When we develop your program application and information packet, we will also put together a program poster/flier. We typically print about 30 letter sized color fliers for posting in various places around campus. In addition, we will print a handful of 11” x 17” color posters; these are great for putting up in your office and your departmental office and are posted in the Education Abroad office.

We will also include your program in the university’s Webmail Log-in Screen (http://webmail.pdx.edu) and the Education Abroad website (http://oia.pdx.edu/ea/). Our website was updated recently and has enhanced search capability and the capability to highlight new and notable programs.

Education Abroad can do targeted e-mail marketing to students. We can pull e-mail addresses for students who have taken related courses with you over some period of time,
other courses in the department or relevant courses from other schools and colleges. These e-mails can be an extremely time-effective way to reach hundreds of students who are interested in your program topic and/or location.

Education Abroad also arranges study abroad fairs to present information on all of our programs to the general campus student body. Our biggest event is in the fall, soon after the start of the academic year. We may coordinate with other departments to present IFL programs at other fairs as well, for example the International Capstone Fair.

**DISCUSSING PROGRAM COST**

Program cost is a deciding factor for many students. The first two questions we get from students are “What is the program about?” Quickly followed by, “How much does it cost?” After students learn the program cost, they often make a decision relatively quickly about whether or not they want to apply for the program. Based upon their understanding of the program cost, they may go ahead and ask for time off from work or set aside other academic plans for that term.

Due to students’ reliance on the cost information they receive, we never release program cost estimates until we review the program budget. We will then determine the cost ranges for tuition, program fee and student out of pocket expenses. The course tuition and the program fee almost always depend on the number of students enrolled. When we talk about cost information with students, we will always present the information on a scale of X to Y, depending on enrollments. We never present cost information as a single fixed price.

You are welcome to begin talking to students about your prospective program before you receive final program approval from Education Abroad. **However, you should not provide any cost information until the budget is approved and Education Abroad issues the official cost estimates.**
APPLICATION DEADLINES

When developing program information and application packets, Education Abroad seeks to set a program application deadline that is as late as possible in order to provide time for program outreach; yet provides sufficient time for students to complete interviews with their study abroad advisor, receive and respond to the admissions decision and still make necessary travel and visa arrangements.
LOW APPLICATIONS/ENROLLMENTS

When you develop your program proposal and budget draft, we ask you to tell us what the minimum, preferred and maximum number of students should be. Based on these numbers we develop the cost range that is distributed to students.

After we send out acceptance notifications to students, we will ask them to confirm their intent to participate. If we do not receive confirmations from the minimum number of students that you specified, then we cannot offer the program in its current form and at the price range we announced to students. At that point we have two choices, we can work with you to attempt to restructure the program logistics to bring the program costs in line with the funds available or we can cancel the program.

Programs that fail to receive a minimum number of confirmed students present a difficult problem. We recognize that you and the students are highly invested in seeing the program move forward. If you are interested in trying to lower the program cost to bring it in on budget, we will certainly try to work with you to do that. However, depending on the structure, costs, and the number of confirmed students we must also recognize that it may not be feasible to move forward and we may have to cancel the program.

EXTENDING APPLICATION DEADLINES

When we develop your program application, we will assign an application deadline. We look to receive at least two-thirds of the minimum number of applications by the initial deadline. So, if your program budget is based on a minimum of eight students, we would like to receive at least six student applications by the application deadline. If we achieve that, then Education Abroad can grant one two week application deadline so that we can work with you on new outreach activities.

STUDENT APPLICATION

Once the program information and application packets are distributed, Education Abroad will begin the review process in consultation with you. We require all prospective IFL students to complete the standard Education Abroad application, however, faculty may suggest alternate questions for the short essays if there is particular information they want to receive and review. A sample application can be found in Appendix IV.

In addition to the biographical, academic, background information and essays that we request in the application, students are required to submit unofficial transcripts and one letter of recommendation. We will provide copies of the student applications to you for your review.

We recognize that in many cases, you will know the students who are applying because they have taken other classes from you. You may not feel that students need to submit all of the information
that we request in the application process for a short program abroad. However, we have found that
the information that we request is both necessary for our own data collection and student support
functions. It is also important for helping to identify students who may not be successful while
abroad or who may need additional support during the program.

**STUDENTS WITH SPOUSES AND CHILDREN**

In most cases, Education Abroad does not allow students to have their spouses or children
accompany them on IFL programs. Most IFL programs are intensive experiences that have a fully
packed, fast-paced itinerary and will typically include long days and strenuous travel
arrangements. It is inevitable that students who are traveling with spouses and children will be
distracted from the ongoing site visits, presentations, discussions and experiential learning that is
part of the academic focus of the program. Spouses and children traveling with an IFL program
will, at some point or another, place some burdens on other students. It is unfair to tell a program
participant that the group must slow or alter their plans to accommodate a sick or tired spouse or
child.

There are occasional exceptions to this policy. Some programs feature little travel, and offer a
fairly structured schedule of class meetings, similar to an on-campus class. In those cases,
spouses may travel with their student partner with the understanding that they are responsible for
their own expenses and arrangements and that they may not be present for program activities
without the consent of the instructor. Similarly, children may be permitted to accompany their
parent(s) on a program like this as long as the student(s) can pre-arrange adequate childcare as
determined by the Office of Education Abroad.

**STUDENT INTERVIEWS**

Undergraduate students are required to complete an
interview with an Education Abroad advisor. You may waive
the program interview requirement for graduate students at
your discretion. After the initial application deadline, if the
program has received enough applications, the advisor will
schedule interviews with the students.

Student interviews also provide an important opportunity
for students to ask questions about the program and to
share any academic, personal, financial or medical
concerns that they may have.

**STUDENT CONDUCT CHECKS**

Our application form asks students to give us their consent to request a review of any student code
of conduct complaints that may have been brought against the student at PSU. We send requests
conduct checks to the Dean of Students Office during the period in which we are conducting student
interviews.

**PARTICIPATING IN INTERVIEWS**

We encourage you to join the Education Abroad advisor and
participate in student interviews. This is a great way to get an early
feel for the goals and personalities of the individual students and to
think about the dynamics of the group as a whole.
If we are informed that a student has committed a code of conduct offense, we will meet with the student in to talk with them. We will typically confirm their understanding that if they participate in a study abroad program, they are still considered PSU students and the university’s code of conduct applies whether they are in a dorm in Portland or a yurt in Mongolia. Depending on the nature and severity of the violation(s), we may ask them to submit a letter explaining the events that resulted in the charge, the decision of the conduct board, and an understanding and commitment that such behavior will not recur while they are abroad. If the incident is a more severe infraction, we may deny a student’s application solely on that basis.

**STUDENT ACCEPTANCES**

After students have been interviewed, we will contact you to discuss any concerns that we have noted. Unless Education Abroad has any specific concerns, we will typically defer to you as to which students you want to admit to your program.

After we agree on the acceptance list, Education Abroad will send out decision notifications to the applicants. If the student is being accepted, they will be asked to reply to the e-mail to provide confirmation that they do intend to participate in the program.

**SECONDARY PAPERWORK**

When we send the e-mail acceptances to students, we will also include additional forms and documents for the students’ review, action and/or signatures. We will ask that they return them to us no later than two weeks after receipt. Typical secondary paperwork includes:

1. A release and assumption of risk customized for your program;
2. Copies of U.S. State Department Consular Information Sheets and any additional U.S. State Dept. travel notices for your host country or countries;
3. A health disclosure form or mandatory physical examination and report form, depending on the physical demands of your proposed program;
4. An enrollment form for PSU’s mandatory international health insurance;
5. Traveler’s health information sheets from the U.S. Center for Disease Control.

**IMPORTANT: BEFORE BOOKING TRAVEL OR MAKING PAYMENTS**

In your program proposal, you told us the minimum, preferred and maximum number of students for your program. Education Abroad must receive confirmations from that minimum number of students before you or the students begin any travel arrangements, program payments or contracting.
STUDENT PRE-DEPARTURE HEALTH CONCERNS

Education Abroad requires students to complete mandatory pre-departure health disclosures in order to participate in all international programs. Our goal is to ensure that we can help the students manage any ongoing health concerns while they are abroad. In most cases, this means explaining the processes for securing and transporting sufficient amounts of any prescription medications they may need, or helping them understand how to manage food allergies while abroad.

In some cases, student health concerns may include more serious physical or mental health conditions. In those cases, we may require students to complete a follow-up evaluation with a physician or counselor. If so, we will provide the student with a statement of conditions for them to pass along to their physician. The statement of conditions is intended to provide the physician with some information about the physical and psychological demands of the program and environmental conditions of the host location. We then ask the physician to indicate whether or not a student is able, in their opinion, to successfully meet those requirements. The certifying physician may indicate that the student is a) okay to participate, b) not okay to participate or c) may participate with specific types of support.

In addition to understanding any medical or mental health concerns that students might have, we also work with them if they have documented learning disabilities. In both cases, we will work closely with PSU’s Disability Resource Center (DRC) to evaluate the student’s needs and to discuss possible options.

The ADA requires that we provide “reasonable accommodation” to students with disabilities both for domestic and international programs. The law does not define what constitutes reasonable accommodation. However, courts have based their interpretation of “reasonable” in light of the organization’s scope and budget. With this standard, given the comparatively large budget of a typical research university such as PSU, the university might be expected to provide a broad range of accommodation and support, so it is important that Education Abroad and the DRC be involved in discussions with you and the student at all points.

DISCUSSING MEDICAL CONDITIONS WITH STUDENTS

The Americans with Disabilities Act (ADA) specifically prohibits discrimination against disabled students. Further, the ADA requires that we provide reasonable accommodation to students with disabilities in both domestic and international educational programs. In order to comply with the ADA, Education Abroad does not request or require medical information from students before issuing admissions decisions for Education Abroad programs.

If a disabled student expresses interest in your IFL program, you should always encourage them to apply for the program. You should never tell a student that they cannot successfully participate in an international program because of your impression of any physical, medical, psychological conditions or learning disabilities.

If a student initiates a conversation with you about their condition and how it may impact their participation in the program, you are welcome to discuss it with them. However, it would be better if you bring Education Abroad into any formal or informal conversations. If you do discuss the student’s condition without Education Abroad present, you should document the discussion as soon as possible thereafter and send your notes to Education Abroad.
External scholarships can be difficult to find for IFL programs. Most external funding agencies that provide support for study abroad students focus on traditional quarter or semester length programs. Moreover, the short time frame from program application to departure falls well outside of the application deadlines and funding announcements which most external agencies require.

Occasionally, a student will identify a program of interest well ahead of time. If the program faculty is relatively certain that they will offer the program again, the student may have enough time to pursue some external scholarships. A list of some scholarships that PSU students often apply to may be found at: [http://oia.pdx.edu/ea/scholarships/](http://oia.pdx.edu/ea/scholarships/).

### KAWASE SCHOLARSHIP

The Office of Education Abroad maintains a scholarship fund that provides funds to PSU students or alumni admitted to PSU education abroad programs. The requirements to be considered for the Kawase Scholarship are:

- Undergraduate or graduate students fully admitted at PSU, or PSU alumni participating as non-degree seeking students;
- Student must be admitted into a PSU-sponsored IFL program;
- Overall grade point average of 3.00 or higher;
- Demonstrate financial need

Typical Kawase awards for students participating in IFL programs are $150 - $350. This is not a large amount, and it certainly will not make programs financially viable for students who otherwise could not afford to attend. However, the award will offset some or all of the Education Abroad fee that each participant is assessed.
PRE-DEPARTURE

After the students are admitted and confirmed, and Education Abroad has established that the program has enough students to meet the minimum enrollments, everyone involved can begin their pre-departure arrangements.

For you this means that you will probably be dividing your time between confirming logistics arrangements and teaching on-campus course meetings, not to mention making your own travel arrangements, getting your visa and updating any immunizations you might need. Likewise, the students will be working to make their travel arrangements, getting their immunizations, visas (and perhaps their passports), attending pre-departure class meetings and completing pre-departure readings and assignments.

This is also the most active period for Education Abroad. We will receive and review students’ secondary paperwork, submit program budgets and student lists to financial aid, set up your course in Banner, complete the program billing, contracts, pre-payments, travel authorizations for participating faculty and staff, and arrange an operating advance or PSU travel card for your use.

Typically, preliminary arrangements with academic partners, such as universities, businesses or NGOs abroad, would have been made during the program concept and proposal stage. So, much of that research and negotiation with these partners will already be done. Once a program is confirmed, we will develop any necessary contracts and will pass them along to you and to the program partners for review and signature.

PRE-DEPARTURE PROGRAM EXPENSES

Once the program is confirmed and the number of students is set, we will begin working with you to confirm and pay for program arrangements such as lodging, ground transportation, and payments to partner organizations, etc. If your program uses a service provider to make most or all of the in-country arrangements, then this process may be fairly simple: Education Abroad will work with you and the service provider to draft a contract, and after approval will process payment for the vendor.

If your program is not using a service provider, you will probably plan much of the specific logistics yourself. When you identify a vendor, such as a hotel, bus or rental car company, you can negotiate the specific details with them and then send a copy of the arrangements together with payment information to Education Abroad and we will arrange payment to the vendor. We will work with you to pre-pay as many of the program arrangements as we can. The more items we can confirm and pay for ahead of time, the less you have to deal with and worry about during the program.

AIRFARE

We will send program acceptances to admitted students and ask them to confirm their intent to participate in the program. After we receive enough confirmations to ensure we have a viable
number of students, we will work with you to purchase your airline ticket and complete the necessary travel authorization.

Portland State University has three contracted agencies for faculty and staff travel arrangements. When you reserve your ticket through one of these agencies, we can charge your ticket directly to our PSU account and you will not have to pay any money out-of-pocket. When booking your travel with one of these agencies, their representative will work with you to find an acceptable itinerary and fare. Once you agree to the arrangements, they will contact the Office of Education Abroad for approval, after which they will issue your ticket. Once your ticket is confirmed, we will draft your travel authorization and send it to you for your review and approval.

<table>
<thead>
<tr>
<th>PSU CONTRACTED TRAVEL AGENCIES</th>
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<tbody>
<tr>
<td>Azumano Travel               866-291-0460</td>
</tr>
<tr>
<td>Journeys by Ambassador       503-226-7200</td>
</tr>
<tr>
<td>Uniglobe                     503-620-0620</td>
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</tbody>
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1) Find an acceptable itinerary and price
2) Ask the agent to e-mail the itinerary to Ron Witczak, witczakr@pdx.edu for approval
3) After your ticket is booked, Education Abroad will issue your Travel Authorization.

If you are booking international travel, you are not required to use one of the contracted agencies. However, if you are using a different agency or internet travel provider you will not be able to charge the ticket to our PSU account. You may purchase your ticket using your personal funds; however, you should also be aware that PSU will not issue reimbursement for your ticket until travel is completed.

Some IFL programs contain both domestic and international components. If you are booking domestic travel and can find a fare that is 5% lower than that offered by one of the PSU travel agencies, document both fares, you may book the ticket at your discretion and pay for it with personal funds. However, the university will not reimburse you until travel is completed.

### PURCHASING TICKETS ON-LINE

Airfares available on the Internet almost always cost less than tickets purchased through one of the three university approved agencies. However, tickets purchased on-line are often non-refundable. Before you purchase a ticket via the Internet from personal funds, you should be aware that the university will not reimburse you until travel is completed and if the program should be canceled, the university may not be able to reimburse you at all.
WEB PAYMENTS

The easiest payments are those where the vendor has a reservation and payment system on their website. Once you forward the details to Education Abroad, we can go onto the website and pay for the service using the Education Abroad departmental travel card.

CREDIT CARD PAYMENTS BY FAX

If we cannot reserve and pay for the service on-line, we might confirm arrangements and payment by faxing our departmental credit card information to the vendor. To arrange this, simply forward the booking details together with a contact name and fax number, and we can send payment information soon thereafter.
WIRE TRANSFERS AND CHECKS

If we cannot pay the vendor by credit card, then we can arrange to pay by wire transfer or university check. Due to the extended time period that it typically takes an international check to clear the vendor’s bank, it is usually preferable to pay via wire transfer.

In order to arrange payment by wire transfer or check we will need a detailed invoice, including payment information, from the vendor. To arrange a wire transfer, we will need a lot of specific bank and account information from the vendor (see box).

CONTRACTS WITH ORGANIZATIONS

If you are working with a single vendor for multiple services, or if PSU or the vendor wants to define the terms of service then either party may request a formal contract. The contract may be drawn up by PSU or by the vendor.

After the contract terms are agreed upon by you, the vendor and Education Abroad, the contract will submitted for final signatures. Contract signatories typically include the faculty member, Education Abroad, a PSU contracts officer and the vendor. PSU can only start to process payment after the all contract signatures are obtained. Even if we sign a contract with a vendor, we will typically request that they also supply an invoice in order to initiate payment.

CONTRACT TIMELINES

In some instances contracts may be drafted and fully executed within a couple of weeks. In other instances, it may take 3-4 months to get contract approval. Processing payment may take a couple of weeks beyond that. If you plan on using one vendor for multiple services or think your program may involve contracts for some other reason, please let us know as early as possible so we can begin the process.

INFORMATION NEEDED FOR A WIRE TRANSFER

- Bank Name
- Bank Address
- City
- Country
- ABA/Routing Code (US Transfers)
- Swift Code (International)
- Sort Code
- Name on Account
- Account Number
CONTRACTING WITH INDIVIDUALS: PERSONAL SERVICE CONTRACTS

Many programs rely on the services of one or more individuals, not organizations, who may take care of program logistics and planning, set up and monitor service-learning activities, serve as a tour guide or interpreter, or may serve as a guest speaker.

In these cases we will use a Personal Services Contract (PSC) to define the services required and to document the payment from PSU to the individual. Sometimes, PSCs are drafted and signed before the program. With these contracts, both the individual and PSU will sign them, and PSU will issue payment upon receipt of an invoice after the program is over.

Sometimes, we use program specific PSCs that you will take with you. These are simple one page contracts that you can use to document cash payments to individuals who provide services during the program. With these contracts, you will pay the individual via cash withdraws from your PSU travel card, or operating advance, and then complete the form and have them sign it.

FIRST TIME CONTRACTS WITH U.S. ORGANIZATIONS AND INDIVIDUALS

U.S. organizations and citizens who are contracting with PSU for the first time will be required to complete and submit a U.S. W-9. This allows PSU to report the payments to the IRS for tax purposes.

TRAVEL FUNDS

As wonderful as it would be to pre-pay all of the program expenses, so you would not have to handle or worry about any of it during your program, it just is not possible. There is no getting around the fact that in addition to all of your other responsibilities during your program, you will also need to pay for and record a lot of program expenses.

PSU does not expect you to pay for program expenses out of your own pocket while you are traveling. About 4-6 weeks before your program begins, we will send you an operating advance breakdown. This is a subset of your budget, containing the line items and amounts that have not been pre-paid and which we believe you will need while you are traveling. Once we confirm that the operating advance breakdown meets your needs we will arrange for you to receive a PSU travel card, or an operating advance check. In general, whether you receive a travel card or operating advance check is your decision, and may be based on your understanding of the type, number and amount of transactions that you anticipate making during the trip. Occasionally, the PSU Business Affairs office may dictate which option you need to use based on their perception of risk or cost to the university.

TRAVEL CARD

Portland State University

10/11
A PSU travel card is by far the easiest way to access funds during your program. After we agree on the operating advance breakdown, we will have a PSU travel card issued in your name. During your program you can use (swipe) your card to make program payments or withdraw cash from ATMs or banks to cover transactions that you need to pay for in cash.

With a travel card, it is still your responsibility to account for your expenditures. But unlike a cash operating advance if the card gets lost or stolen you are not personally responsible for accounting for the balance of the operating advance. We can simply cancel the card. Another advantage of the travel card is that if you need additional funds during the program, we can easily increase the credit limit on the card. Finally, the credit card statements for the travel card come directly to Education Abroad, which makes the post-program reconciliation much simpler for everyone.

CASH WITHDRAW LIMITS

With the travel card, daily cash withdraws from ATMs are often limited to $200 - $500. If you have to make a large cash payment at some point, you may have to withdraw the cash over two or more days. Please remember, however, that you can go into most banks and withdraw higher amounts by completing the transaction at the teller window.

OPERATING ADVANCE CHECK

For some programs, in some countries, a travel card may be problematic. This may be true in some developing countries where the banking or telecommunications infrastructure is unreliable or where the program structure calls for large amounts of ready cash at certain points. In these rare cases, we may request an operating advance check instead of a travel card. You would deposit the check in your personal account, and would then have access to the full amount immediately.

You should understand that if you receive an operating advance check, you are personally responsible for accounting for all of those funds, even the unspent amount. If you lose your wallet or your hotel room gets robbed while you are abroad, it becomes a huge headache both for you and the university. In addition, with an operating advance check, it becomes difficult for us to provide additional funds to you mid-program in response to an unforeseen event.

MONEY HANDLING/SECURITY WHILE OVERSEAS

Faculty leaders should exercise caution when carrying a substantial amount of cash overseas. In conjunction with PSU Education Abroad office staff, they can determine the best plan for how they should carry program funds overseas. We recommend that faculty leaders use a PSU Visa card, which can function like a group travel credit card. In this manner, faculty leaders can withdraw money from ATMs when necessary. However, we realize that certain programs in some countries are not suitable to this mode of money management.

As a result, we recommend the following:

- Avoid traveling alone, especially at night.
- Exercise caution when strangers approach offering something to buy or to be a guide.
• Beware of pickpockets. A cute, sweet-looking child or even a woman with a baby can be a pickpocket. Beware of groups of children who create distractions so they can pick your pocket.
• Try to seem purposeful and confident when traveling.
• Be careful when using an ATM machine. Try to use only those ATM machines that are well lit and in a seemingly safe location. Withdraw only as much cash as you will need in the near future. Try to use ATM machines that are equipped with a “swipe” feature in order to avoid your card being eaten by the machine.
• Keep cash in a secure location. If carrying large amounts of cash, use an undergarment money belt.
• Make sure credit cards are returned after each transaction. Know where your credit card is at all times.
• Make a note of the credit card number and issuing bank, in case of theft or loss.
• Be discreet when paying a bill. Do not “flash” large amounts of cash.

PRE-DEPARTURE ORIENTATION

The Faculty Leader, with the assistance of the PSU Education Abroad office, conducts at least one pre-departure orientation session for participants that includes: logistics, cultural and academic preparation, and safety issues. It is mandatory that students attend orientation.

The following topics should be addressed during the orientation:

• General program schedule (if group is not traveling together, include detailed instructions on how students will arrive on-site. Communication of exact date, time, etc. to arrive is essential.)
• Academic and non-academic expectations.
• Health (insurance, immunizations (check CDC website), nutrition/food safety, health emergency, risk & accident prevention, jetlag, sexuality, etc.).
• Living conditions, accommodations, etc.
• Packing/dress standards, if necessary.
• Culture/Culture shock;
• Money: ATM, traveler’s checks, etc. Budgeting for extra, non-program related expenses.
• Time differences, telephone usage, etc.
• Gifts, greetings, special procedures for host country/program.
DURING YOUR PROGRAM

After many, many months of hard work, you and your students arrive in your host country and the program begins. If everything goes smoothly, and it usually does, then this is one of the easiest periods for the Education Abroad staff.

The most important thing for you to keep in mind while you are abroad is that you are not alone. You have a whole host of people behind you: staff from Education Abroad, Student Health and Counseling, University Counsel, the Dean of Students, Wells Fargo Student Insurance and their carriers are here to assist you as needed; and if necessary we can call on professional staff from Oregon State government agencies as needed.

It is rare for anything critical to arise. You and your students are going to have a great educational experience. Many of your students will almost certainly comment that your program is a life changing experience, and in their contagious enthusiasm you may well find your own perspectives refreshed and energized.

Beyond the logistics issues that may arise—particularly if you are traveling in a lesser developed country—the most common problem that programs encounter abroad are, (in decreasing order of occurrence):

1. Excessive student alcohol consumption
2. Difficulty with cultural adaptation
3. Medical issues;

And occasionally,

4. Recreational drug use.

ALCOHOL CONSUMPTION

Use of alcohol during Education Abroad programs can become a problem, especially for students who are under 21 and suddenly find that they can drink legally while abroad. It often happens that, even after a 12-hour day of program activities and class work, students will go out to “explore the local club scene” late into the evening. Needless to say, they often find it difficult to be up and at their best on time the next morning.

In addition, some program activities, such as dinners with local partners or host families, may include social alcohol use, as is the custom in that host country. U.S. students often do not understand, or know how to, properly limit alcohol use in these settings.

We suggest that you have a discussion with all participants prior to the program to determine group standards relating to responsible alcohol use. It is often helpful to discuss each student’s personal goals for their participation in the program and to explain that all members of the group hold a
responsibility to respect the goals of their fellow students and to assist them in meeting those goals. At the same time it can be brought out that excessive alcohol consumption by one or a few students becomes an issue for all when it interferes with other’s learning goals. It also creates a negative impression of the program or PSU as a whole. You may also find it helpful to suggest that your group establish certain nights of the week where they will curtail or abstain from drinking so that everyone is at their best the next day.

Standards for responsible alcohol usage might include any or all of the following:

1. The student’s alcohol consumption is in harmony with the way alcohol is consumed in the host country. Culturally, the student does not conflict with normal practices in the host country.
2. A student does not miss any scheduled event because of the effects of alcohol consumption.
3. A student does not become ill due to the effects of alcohol consumption.
4. A student abides by the laws of the country in which he or she is living.
5. A student does not engage in behavior that causes embarrassment to the other members of the group, the faculty leader(s), PSU, or the in-country host(s) as a result of alcohol consumption.

CULTURAL ADAPATION/CULTURE SHOCK

After alcohol, culture shock is perhaps the next most common cause for negative student behavior. Students may experience significant difficulties with cultural adaptation even within the short time frames of IFL programs. Students experiencing severe culture shock will often become anti-social, overly negative towards the program or host country, and/or argumentative towards the other program participants or even in interactions with locals, host families and even program partners. For more information, please see Culture, page 27.

ILLEGAL DRUG USE

The use of illegal substances is prohibited on any PSU Education Abroad program. This should be made clear to students before and during their participation in the program. Additionally, students must be informed that penalties for using illegal substances in other countries can be much higher than in the U.S. and that there is nothing that a faculty leader or the U.S. Embassy can do to assist a student who is caught breaking the laws of the host country. If it comes to the attention of the faculty leader that any student is using illegal substances, the student should be immediately removed from the program.

Removing a student from a program under these circumstances can be a very difficult decision. If you are put in this situation, you may prefer to downplay its importance or potential impact, instead of forcing a student out of your program, requiring them to return to home at their own expense and facing the consequences of a student conduct review. However, it is important to remember that if a student’s illicit drug use has come to your attention, it is equally likely that it has been noticed by your program hosts, homestay family, or other locals. Keeping the student in the program negatively reflects and impacts the university’s reputation and our ability to offer a similar program in that location in the future. In addition, keeping the student in the program penalizes the rest of the program students who have a right to expect a learning environment that will allow them to meet their own goals for the program. Finally, if illicit drug use has come to your attention, it is that much more likely that the student’s activities will begin to affect their ability to participate in or contribute
to the goals of the program, and may soon come to the attention of the local police. Removing a student due to illicit drug use, prevents the situation from becoming something much more serious.

**MANAGING STUDENT/GROUP BEHAVIOR**

Managing a student or student(s) behavior during an IFL program can be a challenge for you and for the group. When responding to a student behavior issue that has affected the group as a whole, it may be counterproductive to single out an individual or incident for a public discussion. You and the students should all understand that you are not their parent. Your primary role is to provide academic instruction, and your primary responsibility is to maintain an atmosphere conducive to learning. You may find it helpful to facilitate a general discussion about the group’s goals and learning environment to help re-establish a group focus on those goals and lead the group to decide on any new processes or agreements to help everyone focus. For example, the group might decide to stay in on certain nights to focus on group projects or prepare for the next day’s meetings; or the group may decide that all students need to be ready in the morning 5 minutes before departure, and that any students who are not ready at the proper time will be left behind.

**DISCUSSING STUDENT BEHAVIOR**

Occasionally, someone who seemed to be a model student in Portland, will develop negative behaviors once they are abroad: they may regularly be a few minutes late, disrespectful to other members of the group, etc. In these cases, it may be preferable to talk with the student privately, one-on-one. It may be enough to discuss your concerns with the student. The student may have been honestly unaware that their behavior was negatively affecting others. Frequently, this type of change in behavior might be an indication that the student is having difficulty adjusting to the new culture or to the demands of the program.

You may feel some trepidation about talking to a student one-on-one like this; but chances are that the conversation will help you start to understand why the student is feeling frustrated. You will then be able to offer some important cross-cultural insights or information to help the student move in a more positive direction. Often, what starts out as a stressful meeting, becomes an empowering discussion for both you and the student as they start to put their feelings and responses to their host culture into perspective.
SANCTIONING STUDENTS

Very rarely, a student will behave in a way that is clearly unacceptable and/or is a violation of the student code of conduct. These are situations that usually require some public response from you in order to demonstrate to your local hosts or to other students that the initial issue has been addressed and will not recur. As a faculty member leading a student group abroad, you have wide discretion in how you respond to student behavior issues. Depending on the nature, cause, evidence and impact of a given student issue, you have the authority to remove a student from your program if you feel it is merited. The student would then be required to remove themselves from program activities and lodging, and commence subsequent travel or their return to the United States at their own expense. Of course, removing a student from your program is an extreme response; most issues that you might encounter will not rise to that level of severity.

Another option available to you is a student behavior contract. A student behavior contract is essentially a written warning; it includes a description of the initial infraction, detailed language about what type of behavior is expected from the student in the future, and explicitly states that any further departure from accepted behavior will result in the student’s immediate dismissal from the program. A sample behavior contract can be found in Appendix V.

Whenever student conduct reaches a level where a behavior contract or expulsion is necessary, it is essential that you fully document the initial event(s), any and all actions that you or other responsible parties may have taken, and all sanctions imposed, and the student’s responses. If you are expelling a student from your program, it is also important that you document the student’s options for individual travel from that point and any information that the student has given you about his/her intentions.

REMOVING A STUDENT FROM A PROGRAM

It is very unlikely that you will ever feel the need to remove a student from your program; but as the on-site program director, you have broad discretion to do so. Moreover, students on Education Abroad programs must abide by the decision of on-site staff, and forgo the right to appeal the decisions of on-site staff until they return to PSU.

However, you do have some obligations and responsibilities in removing a student from your program, these are:

1. Document the student’s behavior, specific incident(s), and your responses to each. You should note any violations of local law, PSU code of conduct, acceptable local standards and customs, etc. Your documentation should include notes about the impact or potential impact of the student’s actions on the individual or group’s health or safety, the group’s relationship with local hosts and partners, and/or negative impact on PSU’s reputation or ability to offer similar programs in that location in the future.

2. Document the response to each incident by the student, the group, local partners. Fully document all discussions that you have with the student, including attempts to understand any underlying causes, discussion of expectations for acceptable behavior, and, if applicable, any written or verbal warnings or behavior contracts.

3. Develop a plan that assesses how a student will be removed from the program:
   a. When and how will they be removed from program housing and group activities? It is generally expected that students will remove themselves from program facilities
immediately after they are notified of their expulsion. It may be necessary to delay that notification until such time as the student can depart immediately.

b. Do they have reasonable options for alternate housing and travel back to a metropolitan area with eventual return to the United States? What are those options?

c. When and how will they be informed of their expulsion in a manner that reduces the impact on the rest of the group and normal program activities?

d. Is there any indication that the student may need emotional support or psychological counseling once they are removed from the program? Is such support available?

e. Wherever possible, a student should be provided with written notification of their expulsion, notification that the student is immediately expected to remove themselves from all group activities, and options for their independent return to the United States.

Finally, we expect that you will make every reasonable effort to consult with the Office of Education Abroad prior to notifying a student of their expulsion.

**PARTICIPANT HEALTH**

Participant health issues arise on almost every international program. The two most common problems are stomach/gastro-intestinal issues caused by the change in diet, and colds/flu symptoms brought about by air travel, heavy schedules and poor sleep. Depending on the location, participants may contract a range of insect borne diseases of differing severities. In addition, personal injuries, animal bites, sprains and cuts may occur on any program. For travel ailments, participants usually recover quite well with a lighter diet and some rest. More serious injuries may require a visit to the doctor or even hospitalization.

The Oregon University System (OUS) requires that all international program participants be covered under an international health insurance policy provided by OUS. The international insurance policy is a basic health care reimbursement plan whereby the participant would see a doctor, pay for services at the time they are rendered, and submit a claim to the insurance carrier upon return to the U.S. The policy also includes a traveler’s assistance piece that covers things from lost luggage, emergency prescriptions, medical evacuation and repatriation, etc. Details of the international insurance policy will be provided to you and your students at the pre-departure orientation.

On the rare occasion that one or more students are traveling independently during a short-term program (on free weekends, etc.), it is imperative that faculty leaders know the area(s) where students are traveling to and when they are expected back. This is important, especially in case of an emergency, natural disaster, terrorist attack, etc.
PROGRAM SAFETY

Any travel, whether domestic or international, carries some risk; that's simply the nature of being in an unfamiliar location. For IFL programs, these risks are increased a bit more because participants don’t have as much time in their host country to familiarize themselves with local laws, customs, and safety precautions. In addition, a greater percentage (versus traditional semester length programs) of IFL programs occur in lesser developed countries or in impoverished locations within a particular town or city; increased incidents of personal crime, crime against tourists and socio-economic or political instability may all be issues for your program. Regardless of the location, participants should take basic, common sense precautions for themselves and their possessions.

Some safety tips that you may want to consider for your group include:

1. Require all students to travel in groups of two or more;
2. Require all students to purchase and carry a cell phone;
3. Institute a program curfew;
4. Avoid high risk activities (also see High Risk Activities page Error! Bookmark not defined.);
5. Stay informed about events in your host country/region;
6. Avoid any and all street demonstrations, even if they appear peaceful;
7. Avoid known hotspots, including high profile businesses owned by or catering to foreigners;
8. Maintain a low profile.

WHEN TO CONTACT EDUCATION ABROAD

Appendix VI contains a list of emergency contacts for you to use during your program. We will also give you a copy of this list before you depart. We are available to you at all times during your program. We would ask that you contact us as soon as possible if any of the following occur:

1. A student is hospitalized, even if they are released after a brief period;
2. You have had to use a behavior contract with a student;
3. If you are considering expelling a student from your program;
4. If there is a significant socio-political event in your country/region;
5. If there is a natural disaster, weather event, or catastrophic accident anywhere in your country or region during your program;
6. If a participant experiences a serious mental health situation (e.g. expressed suicidal ideation).
DOCUMENTING PROGRAM EXPENSES

All of the program funds, whether they are used to pay pre-departure or on-site expenses, are State of Oregon funds and expenditures must be clearly documented. Education Abroad will work with you and your program vendors to document the pre-departure expenses through contracts, invoices, e-mails and faxes.

During the program, it will be your responsibility to document your day–to–day expenditures. This isn’t as onerous as it might sound, it just requires some organization. For most of your program expenses, such as cab rides, meals, and lodging, it will be relatively easy to get a receipt.

Obviously, it’s not always possible to get a receipt, or you may forget to ask for a receipt for a cab ride once you get to your destination. The easy solution is to carry a small notebook with you to make a note of unreceipted expenses, simply indicating the type of service and the amount.

When you return to PSU after the program, Education Abroad will collect your receipts and begin your program reconciliation. When you submit your receipts, you should also include a memo listing and detailing your unreceipted expenses. There is no hard and fast rule about how many transactions, or the maximum size of the individual transaction that you can report this way. Instead, the PSU Business Affairs Office is looking to see that you made conscientious efforts to get receipts and will accept a reasonable number of unreceipted expenses as long as they are documented.

The general rule of thumb is to get receipts where ever possible and to document everything else.

TIPPING

University policies allow for gratuities of up to 15% on meals only. Please note gratuities on the receipt that you will submit to Education Abroad upon your return. The university does not reimburse tips greater than 15%. Payments and tips to individuals for other services must be paid for from budgeted M&IE per diem amounts (see Meals and Incidental Expenses, page 43) or documented using duly signed and documented personal service contract templates (discussed below).

PERSONAL SERVICE CONTRACT TEMPLATES

You can use Personal Service Contracts (PSCs) to document payments to individual service providers during the program. PSCs work well for documenting honoraria, payments to translators, logistics coordinators and similar payments to individuals who provide a service to the program but may not typically be prepared to give receipts.

Education Abroad will provide you with a PSC template for your program. You should print out and take a number of copies with you. If you give an honorarium to a guest speaker, for example, you can ask the individual to write their name and information on the form and sign it. You can then add the type of service and the amount paid.

Please note: PSC templates may not be used for expenses greater than $5,000.
DOCUMENTING EXCHANGE RATES

Documenting the effective exchange rate used is the most common problem encountered during the post-program reconciliation, and it is probably one of the easiest to avoid. When you use a credit card or debit card to pay for a program your transaction receipt will show the payment in the local currency. The PSU travel card statement or a redacted version of your credit card or bank card statement will show the transaction amount in U.S. dollars. Using both of those documents, we can clearly establish the exchange rate for the transaction.

Similarly, when withdrawing cash from a bank or ATM, be sure to hang on to your transaction receipt. When you get back, we can compare the local currency transaction amount versus the U.S. dollar amount on the PSU travel card statement or a redacted version of your credit card or bank statement.

When we are reconciling IFL program expenses and do not have both the in-country receipt and a U.S. dollar reference, then we have to use the university’s official exchange rate reference source, oanda.com. Even though we will reference the published rate on the specific date of the transaction, inevitably, the published rate is less favorable than the rate than the actual transaction rate.

TIPS FOR TRACKING PROGRAM EXPENSES

1. Always ask for a receipt
2. Get and keep ATM and currency exchange receipts
3. Bring a manila envelope for storing the day’s receipts
4. Use a little notebook for recording expense details when you can’t get a receipt
5. Use PSC templates to document larger expenses to individuals
POST PROGRAM

Within one month of the close of a program, the director should submit a summary report to Education Abroad that addresses the following points:

- Name, dates and location of the program
- Overall description of the group as a whole (majors, class standing, language levels, etc.). Were students from PSU only?
- Pre-departure orientation and preparation of students
- Arrival logistics—where did the students go and what did they do upon arrival?
- On-site orientation. Where did on-site orientation take place and what did it include? Was it adequate in helping students adjust? Suggestions or ideas for the next cycle?
- Academic strengths, and weaknesses; prospective changes if the program were offered again
- Influence of the international setting on the academic experience;
- Student attendance and participation
- Description of student and faculty housing and meal arrangements. Any issues with housing made during the program? How were problems dealt with? Recommendations for improving the living arrangements of students?
- On-site staff: Who were the other people involved in running the program and were they effective? Were there any problems with program partners?
- Issues concerning student health and safety. Explain incidents that occurred or concerns. What health facilities, doctors, etc., did the students use? Were these services adequate? Did any issues arise in regards to the safety of students?
- Excursions: Who led the excursions? Were the excursions part of the academic program or separate? Describe each excursion and provide recommendations for improvement
- Relationships with host institutions, host nationals: Were the students well received? Was the relationship mutually enjoyable and beneficial? Are there additional ways that students in future program cycles could be integrated into the local community?
- Program Finances/ Budget: Was the budget sufficient to cover program costs and were the arrangements adequate?
- Overall recommendations for the program in the future. Was the program a positive learning experience for you and the students? Are there any changes happening at the host university, institution or country which may affect the program? What are your basic recommendations for program improvement?
- What should the next program director or Education Abroad Office do differently?

Education Abroad will read and use your reports, along with student evaluations, to make changes to programs as needed.
POST PROGRAM RECONCILIATION

When your program travel is complete, the easiest thing to do is simply to bring all of your program receipts and documentation, including redacted versions of any applicable credit card or bank card statements, to Education Abroad. We will prepare the program expense reconciliation and send it to you for your review, approval and signature. If you have paid for program expenses from personal funds, the university will issue a reimbursement. If you have undocumented, unapproved or unrelated expenses, you may be asked to write a check to the university to cover those costs.

If your program receipts are in another language, it can be very helpful if you make a note on the receipt somewhere telling us what the expense was for: cab fare, restaurant, ATM, etc.. This will help us match the expense against the specific line item in the program budget.

Some faculty take the extra step of compiling their receipts in a spreadsheet so that they can take a comprehensive look at them before turning the receipts into Education Abroad. You are certainly welcome to do that, but we will have to compile the reconciliation from scratch based on the receipts and documentation that you give us. Organizing your receipts by date would be helpful, but do not feel obligated to do too much.
# APPENDIX I: PSU TRAVEL POLICIES FOR FACULTY

<table>
<thead>
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<th>Section</th>
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## 7.000 Frequently Asked Questions About Travel

Q. Do I need to submit receipts with my Travel Reimbursement Request?

1. JANUARY 2009
Appendix I: PSU Travel Policies for Faculty

PSU - DEPARTMENT GUIDE TO BUSINESS AFFAIRS

SECTION 7: TRAVEL

A. For most overnight trips you'll be reimbursed for per diem, fixed amounts for meals and lodging. Per diems are quick and easy and you don't need receipts. See 7.010 and 7.011.

Q. Why am I limited to certain amounts for lodging and meals instead of submitting receipts?
A. PSU’s travel rates are established by OUS for the System. We function under an "Accountable Plan," following the IRS tax code. Payments that exceed the established rates are considered miscellaneous income to the recipient by the IRS. We would be required to tax you for the difference that exceeds our rates. See 7.013 and 7.014.

Q. Why do we have High and Low Cities per diems?
A. Under OUS' Accountable Plan, OUS chose the simpler plan, using federal tables that indicate which cities (e.g., New York and Chicago) are "High" with all other locations considered "Low." The High and Low City concept satisfies IRS rules. See 7.014.

Q. What are the foreign per diem rates for particular cities?
A. The meals and lodging rates vary by location and are found through the US Department of State web site. See 7.015 for the reference.

Q. Am I allowed to buy airfares on the internet? Can I use my brother-in-law's travel agency?
A. PSU has three contract travel agencies that by contract will give you lowest fare, government (City Pair) fare, and bill back to your index. If you can find a lower fare by 5%, through any source, document with written quote, book the ticket, and pay for it with your Corporate Travel VISA Card or personal fund, and file for reimbursement after trip commences. See 7.025.

Q. Why must I pay my own hotel charges?
A. While we will pay travel advances or pay advance lodging for student groups or athletic team travel, we require the traveler to pay for his or her lodging and travel expenses (using the PSU-supplied Corporate VISA Card works great) and receive reimbursement. See 7.011.

Q. What are the advantages of using PSU’s Corporate VISA Card?
A. First, US Bank guarantees that anyone we request will receive a Corporate Card. Second, the Corporate Card is free; there's no annual fee to use it. Third, the Card provides primary automobile insurance for rental vehicles. This could save your program the $2,500 deductible in case of an accident. See 7.008.

Q. Why does it take so long to get reimbursed for my trip?
A. With in most cases, receipts not required and reimbursement determined from daily per diem rates, travel claims should be less complicated and easier to prepare. Once submitted to Specialized Accounting Services or Research Accounting for grants, claims are normally paid within the week. We have direct deposit (called ACH) to employees' bank accounts to increase the speed of the payment for reimbursements. See 7.026.

Q. What Account Codes do I use?
A. See 7.026c for a complete list of codes.

Q. Can I use my personal car to take an authorized trip or am I required to use a State car?

2
JANUARY 2009
Appendix I: PSU Travel Policies for Faculty

PSU - DEPARTMENT GUIDE TO BUSINESS AFFAIRS

SECTION 7: TRAVEL

A. There must be an economic or convenience benefit factor in using your own vehicle over renting a State vehicle from the Portland Motor Pool. Private vehicles must have insurance and carry safety equipment such as first aid kit, flares, and fire extinguisher. See 7.018 for a full discussion.

Q. Where do I find the Motor Pool to rent a State car?
A. The Portland State Motor Pool, located on Swan Island, 971-673-6100. Note: there’s a $25 charge for missed reservations and Van reservation must be canceled within 48 hours without or a $25.00 will be charge. See 7.019 for further procedures.

Q. What do I do if I’m in an accident while driving a State car? Or, a rental car from major car companies?
A. Your Motor Pool vehicle has an accident reporting kit in the glove box. Assuming you’re still standing, use the kit to document the accident and exchange insurance information with the other driver or property owner. Rental cars carry similar packages in case of accidents. Report vehicle accidents to your department and Don Johansen in Business Affairs, 5-5340.

Q. If I rent a car, should I accept CDW (Collision Damage Waiver) coverage?
A. Yes, since the increase of the agency deductible, you (as a PSU employee) should purchase the Limited Damage Waiver (LDW) or Collision Damage Waiver (CDW). If the Limited Damage Waiver is available and not purchased by the agency at the time of rental, the agency’s current deductible amount will be doubled in the event of a loss. We now have contract with Enterprise Car rental which include CDW coverage. Please use our corporate account (BB46W68) and your index number to make reservation.

Q. If I use my own car for travel, can I charge maintenance costs on my reimbursement?
A. No. The mileage reimbursement is intended to compensate the driver for all direct operating costs. These costs include fuel, tires, wear and tear, auto liability insurance, and depreciation. If your vehicle needs a new battery, for instance, that’s an expense the driver must pay for out of his or her own pocket. For many employees, it is less complicated and less costly to rent a Motor Pool vehicle instead.

7.001 Travel Administration PSU's travel policies are derived from travel rules established and authorized by the Oregon State Board of Higher Education (OSBHE) on behalf of the universities of the Oregon University System (OUS). OUS’ travel rules are found in Section 11.01 of the Financial Administrative Standard Operating Manual (FASOM). FASOM allows each OUS institution to develop its own travel policies without exceeding the limits established in FASOM 11.00. This section of FASOM can be accessed through the OUS home page at http://www.ous.edu/cont-div/fpm/pl.

It is OUS policy to pay for or reimburse employees and authorized non-employees traveling on official university business. Such payment or reimbursement is subject to all applicable statutes, regulations, bargaining agreements, contracts, policies, and budget availability. Questions about this set of travel policies should be directed to PSU’s Travel Clerk at ext. 5-3733, 5-4382 or ssupkg@pdx.edu.

3

JANUARY 2009
Appendix I: PSU Travel Policies for Faculty

PSU - DEPARTMENT GUIDE TO BUSINESS AFFAIRS

SECTION 7: TRAVEL

7.002 Basic Principles of Travel Policy The University has several fundamental travel policies.
   a. University travel shall be allowed only when the travel is essential to the normal discharge of
      official duties.
   b. Travel is to be conducted in the most efficient and cost-effective manner, resulting in the best
      value to the university.
   c. Each department is charged with the responsibility for determining the necessity and
      justification for travel, including the selected method of travel.
   d. Departments shall make every effort possible to minimize personnel time spent on out-of-state
      travel.
   e. Departments and university personnel must comply with all provisions of this travel policy.

7.003 Methods of Payment for Travel Services Authorized travel expenses may be paid in several ways:
   directly reimbursed to the authorized claimant (either an employee or authorized non-employee);
   directly paid in advance or after-the-fact to the travel vendor through FIS, or by direct payment to
   the travel vendor through either of PSU’s contract travel agencies using our Procurement “ghost
   cards.”
   a. Procurement Cards for Athletic Team Travel, Geology Field Trips, Student development,
      and the Travel Desk can be used to charge travel services, including ATM access. The Cards
      for these areas are associated with team and group travel, therefore, authorized to charge travel-
      related costs.
   b. Procurement Cards from other departments may be used for conference registrations. Except
      as explained in Section 7.011 regarding hotel reservations, departments are not to use their
      purchasing Procurement Cards for other travel-related services or hosting.

7.004 Payment of Personal Expenses Prohibited Payment of personal expenses and travel to places of
   entertainment or for other personal pursuits using university funds or resources is not allowable.
   Reimbursement of personal expenses is not authorized.

7.005 Definitions of Common Travel Terms These terms are used throughout this Policy:
   a. In-State Travel - Travel between locations in Oregon and travel to Oregon.
   b. Out-of-State Travel - Travel from Oregon to a destination within the continental U.S. This may
      include travel between points outside of Oregon, where the trip does not originate from or return
      to Oregon.
   c. Foreign Travel - Travel to, from, or in foreign countries.
   d. Outside the Continental United States (OCONUS) Travel - OCONUS travel comprises travel
      in Alaska, Hawaii, Puerto Rico, and U.S. Possessions. Travel to Alaska and Hawaii uses out-of-
      state account codes. Use foreign account codes when traveling to Puerto Rico or the U.S.
      Possessions.
   e. Commercial Travel - Travel requiring overnight stay from employee’s official station with
      expenses arising from the use of commercial lodging.
   f. Non-traditional Travel - Overnight travel using non-commercial lodging, e.g., camping in a
      park, using an RV, or a private home.
   g. Official Station - The city, town or other location to which an employee is assigned.
   h. Per Diem - Reimbursement amounts for lodging, meal and incidental expenses for a 24-hour
Appendix I: PSU Travel Policies for Faculty

PSU - DEPARTMENT GUIDE TO BUSINESS AFFAIRS

SECTION 7: TRAVEL

period.

i. Incidental Expenses - These expenses are combined with meals into a single rate. Incidental expenses include, but are not limited to: tips, gratuities, and fees for services such as waiters and baggage handlers; and laundry and dry cleaning expenses. The term does not apply to taxis, airport shuttles, telephone, fax or internet; these are to be itemized and reimbursed at cost with business purpose.

j. Unrestricted Air Travel - Air travel for which no advance purchase or stay restrictions are placed on the ticket purchase. The state's City-Pair airline contracts are examples of unrestricted air travel.

7.006 Approvals - Travel and Expense Reimbursement Travel expenses will be reimbursed provided the trip is approved in advance by authorized university personnel, usually the department head, Director, Dean, Chair, Vice provost, Provost and President. Grants and contract projects may need to obtain current budget approval from Research Accounting before travel commences. ALL OUT-OF-STATE TRAVEL FROM ALL FUNDS MUST BE APPROVED IN ADVANCE.

a. In-State, Out-of-State, and Foreign Travel Approvals - Authorizations for travel may be verbal or written, subject to the policy of the department. Blanket authorization for a series of trips may receive a single advance approval. Employees whose duties require frequent or continuous in-state travel are considered to have advance approval when the required travel is within the usual limits of their duties.

b. Travel Authorization Form (TAF) --. Travel Authorization is required for all Out of State, Foreign or In-State Travel with Airfare purchase. Approval from your department head, Director, Dean, Chair, etc. is still required.

c. When grant or contract funds are used, Out-of-State travel requires the advance approval of the employee's Principal Investigator (PI), if the PI travel, their supervisor must sign as approval. Route a copy of the TAF to Research Accounting (BO-RA).

7.007 Persons Eligible for Travel Expense Reimbursement The following may be reimbursed for official travel expenses:

a. Employees - Employees of PSU or OUS, including faculty, staff, and students whose duties include official travel.

b. OUS Board Members and Unpaid Members of Advisory Committees - OSBHE members or members of advisory committees may be approved for official travel.

c. Recruitment for Employment - Candidates for positions may, with prior approval, travel to PSU or another site for interview in the course of recruitment.

d. Athletic Recruits - Athletics may pay for the cost of travel for prospective athletes (recruits) to visit PSU.

e. New Employees - New faculty employees may be given funds (usually up to one month's salary) to travel to Portland to find housing or for moving expenses.

f. Students - Non-employee students may travel as part of an educational program, including athletics.

g. Employees of Other State Agencies - These employees may travel on behalf of PSU.

JANUARY 2009
Appendix I: PSU Travel Policies for Faculty

PSU - DEPARTMENT GUIDE TO BUSINESS AFFAIRS

SECTION 7: TRAVEL

b. Non-Employees and Volunteer Workers - These include consultants, official guests, speakers, and volunteers. However, family members must pay their own way. Volunteers must be officially sanctioned through the Human Resources Center.

i. PSC Contract: No expense or reimbursement may be paid separately unless it is clearly stated in the PSC.

7.008 Travel Advances Issued by Business Affairs and Corporate Travel Cards. A travel advance is only available for team and group travel or under special circumstances approved by the Associates Director of Business Affairs. The amount is "advanced" to the employee, via a check or ACH transaction, as an accounts receivable transaction. This transaction isn't encumbered, so it is vital to account for the advances issued to your department.

a. Travel Advance Eligibility - Employees eligible for a travel advance may submit the Travel Advance form through the Office of Business affairs in NH 167C for approval and for grant through Research Accounting, under the following circumstances:
- A Foreign trip of extended duration with the approval from the Director of Business Affairs.
- A trip involving students or students groups.
- Where there is a hardship, e.g., where an employee does not qualify for a Corporate card. Choosing to not carry charge cards or not carrying a University-provided Corporate card, which are personal choices, does not qualify the traveler for a travel advance. Travel Advance request for hardship situation must be directed to Associate Director of Business Affairs, Susan Dodd, 2 weeks prior to date required for approval.
- Usually, an employee isn’t eligible for a new TA unless the previous one has been cleared, paid off by submitting a Travel Reimbursement Request (TRR).
- A TA must be cleared by the 10th of the month following the end of the trip. Travel advances not cleared in a timely manner may be charged against the employee's pay through the payroll system.

b. Travel Advance Limits - The dollar limits of a TA are:
- $100 minimum (unless students are involved)
- Maximum of 80% of estimated trip expenses (individual)
- Maximum of 100% of estimated trip expenses (student field trip or team)

c. Clearing Travel Advances - A completed Travel Reimbursement Request form clears the advance when the Travel Advance indicator is checked. If an additional amount is owed, please indicate the amount above the amount of the initial advance. If the claimant's travel costs less than the advance, the difference has to be refunded. Attach a personal check, payable to PSU, to the travel reimbursement form.

d. US Bank Corporate VISA Card - Employees are expected to apply through the FIS Office for a US Bank Corporate VISA Card which is used to charge travel expenses. This card is available to any employee who may have reimbursable travel expenses. New cards are available within 10 working days. The card is in the name of the employee who is solely liable for charges made to the card. The full amount on the US Bank monthly statement is due upon receipt. US Bank assesses late charges in accordance with the charge card agreement. US Bank cards are valid only

6

JANUARY 2009
Appendix I: PSU Travel Policies for Faculty

PSU - DEPARTMENT GUIDE TO BUSINESS AFFAIRS

SECTION 7: TRAVEL

while cardholders are employees; a card becomes invalid on termination or retirement (unless the retired faculty member anticipates further business travel).

e. Cash Advances Using Corporate VISA Card - Employees' Corporate VISA Cards may be used to obtain cash advances before or during the trip through a world-wide network of ATMs or by going to any bank and making a cash withdrawal.
- Corporate VISA cash advance service charge fees are equal to 2% of the cash advanced. This is an allowable travel expense to be itemized on the travel reimbursement.
- Cash advance limits are presently: up to $300 per day, not to exceed $1,000 per seven-day period. Different limits can be put on individual cards, please contact Kris Schultz at 5-3734.

7.009 Travel Paid by Outside Source: Outside entities may reimburse a campus department, pay a service provider directly, or reimburse an employee for travel expenses related to PSU business. If the service provider is paid directly, or if reimbursement is made to an employee, OUS rules require that documentation of the arrangement should be maintained in campus travel records. To do this, the traveler submits a Travel Authorization Form that outlines the trip, its purpose, and shows no cost to the university. If the outside party reimburses the department, it should be accounted for as a reduction of expense (not revenue) using the same account code(s) as the original charge.

7.010 Meal and Incidental Expense Reimbursement: Generally, meal and incidental expenses are reimbursed at a per diem rate without the necessity for actual receipts. These expenses may be reimbursed only if the traveler qualifies for lodging-expense reimbursement, except as noted.

a. Meals on One-Day (non-overnight) Trips - When a traveler departs and returns the same day, meal expenses are usually not reimbursed except in the following examples:
- when traveling as an OUS board member or unpaid member of an advisory committee.
- when a meal at a convention, conference, or meeting is part of the agenda. Usually, the meal is paid for as part of the workshop fee.
- when directed or required to attend mealtime business meetings, including community or public relations meetings.
- trips by athletic teams and student groups, in state rate - coach meal is taxable per IRS.
- when employees leave their official station two or more hours before their regular work shift, they may claim the breakfast allowance only (in state rate - taxable per IRS).
- when employees return to their official station two or more hours after their regular work shift, they may claim the dinner allowance only (in state rate - taxable per IRS).

b. Proration of Meals for Partial Days on Overnight Trips

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<th>Initial Day of Travel - Leave</th>
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<th>7:00 AM to 12:59 PM</th>
<th>1:00 PM and after</th>
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<td>Lunch, dinner</td>
<td>Dinner</td>
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<td>Final Day of Travel - Return</td>
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<td>Breakfast, lunch</td>
<td>Breakfast, lunch, dinner</td>
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Applicable meal and incidental expense per diem may not be claimed if a meal is provided at a hosted function, e.g., when a registration fee includes a meal. The per diem rate for a full day's meal and incidental expenses is apportioned:

JANUARY 2009
Appendix I: PSU Travel Policies for Faculty

PSU - DEPARTMENT GUIDE TO BUSINESS AFFAIRS

SECTION 7: TRAVEL

- breakfast 25%
- lunch 25%
- dinner 50%

c. Actual Meal Expense Reimbursement - Reimbursement for meals at actual expense is only allowed for:

- hosting official guests and groups (hosting limits are: $10 breakfast; $15 lunch; $30 dinner. All prices include tips and gratuities.) Note: Hosting is usually done in Portland and not in travel status. Hosting while on travel status requires the claimant to be reimbursed at hosting rates.
- athletic team and student group meal expenses (actual, but per person rate is to be within per diem limits).
- OUS board members and unpaid members of advisory committees.
- For these meals, a gratuity of up to 15% may be claimed.
- These reimbursements require itemized receipts. And, the claim must separate meal cost and gratuity paid. When a single reimbursement is submitted for multiple employees, all employees and guests names should be identified on the reimbursement and a business purpose is required. Note: expenses for alcohol are not reimbursed.

7.011 Lodging. Lodging expenses are normally reimbursed when authorized campus personnel determine that the traveler would not reasonably be expected to return to his or her residence between work shifts. Generally, lodging under OUS's Accountable Plan (i.e., meeting IRS rules) is paid at per diem rates. These flat rates do not require lodging receipts. Exceptions to the per diem rate concept are conferences and workshops where the traveler stays at the conference site hotel, where the lodging rate could exceed the per diem rate allowance. In the case of an exception, lodging is reimbursed at actual and reasonable rates with conference brochure and lodging receipts required.

a. Hotel Reservations - Departments may make hotel reservations for their travelers and by using their department’s VISA Procurement Card to reserve only, but we prefer that you use your own personal card or your PSU Corporate travel card. (See 7.008b to obtain a Corporate VISA Card.) The department Procurement Card is not to be used to pay the traveler’s hotel bill, merely to guarantee the initial reservation.

b. Lodging Receipt Requirements - In the instances, usually for lodging a “conference site,” where original lodging receipts are required to reimburse claimants actual lodging expenses, the receipts must show:

- traveler's name
- date(s) of lodging
- room number
- number of guests
- single room rate (if not printed, traveler may enter this and sign receipt)
- actual amount paid

January 2009
Appendix I: PSU Travel Policies for Faculty

PSU - DEPARTMENT GUIDE TO BUSINESS AFFAIRS

SECTION 7: TRAVEL

c. Lodging Taxes - Taxes on lodging are not included in the lodging per diem rate. If actual costs are reimbursed, the amount itemized for lodging should be the total lodging expense including taxes.

7.012 Miscellaneous Expenses: Necessary business-related expenses are normally reimbursed. Personal expenses are not reimbursed. **Miscellaneous expenses must be itemized for reimbursement.**

Necessary miscellaneous business-related expenses are not reimbursed using a per diem; rather, if the traveler has incurred a miscellaneous business expense as outlined below, that expense is reimbursable at the actual cost:

a. Taxi fares, airport shuttles, and tolls **do not require receipts unless the taxi fare is above $75.**

b. Checked Baggage (receipts required if over $25 per item)
   - Up to 2 standard-weight bags (standard weight as defined by the airline used)
   - Additional baggage (more than 2 bags) or overweight baggage may be reimbursed only when approved by authorized institution personnel and receipts required.

c. Expenses Normally Reimbursed: These items of expense need to be itemized; no receipt is needed unless a single transaction exceeds $25.

   - ATM cash advance transaction fee, up to 2% as charged by US Bank for the Corporate VISA Card.
   - business-related telephone, business internet and facsimile charges.
   - postage, express charges.
   - one long-distance call to a family member on the first day of travel and alternating days thereafter; limits up to $10.00. Costs must be shown on hotel bill, phone card... etc.
   - cost of buying traveler's checks.
   - emergency purchase of materials and supplies.
   - visa and passport expenses.
   - transportation costs such as taxi (the table below lists **one-way cab fares** from the University to the Portland International Airport) and airport shuttle fares, bridge and turnpike tolls, ferry fares, and parking charges (economy rate at PDX $8.00/day).
   - **Mileage to and from PSU to Portland Airport is 12 miles one-way only.**

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<th>Additional Fees (added to the fare)</th>
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</thead>
<tbody>
<tr>
<td>Radio Cab Company</td>
<td>503.227.1212</td>
<td>$40</td>
<td>$1 for each additional person</td>
</tr>
<tr>
<td>Broadway Cab Company</td>
<td>503.227.1234</td>
<td>$40</td>
<td>$1 for each additional person</td>
</tr>
<tr>
<td>Green Cab</td>
<td>503.252.4422</td>
<td>$40</td>
<td>$1 for each additional person</td>
</tr>
<tr>
<td>New Rose City Cab Company</td>
<td>503.282.7707</td>
<td>$40</td>
<td>$1 for each additional person</td>
</tr>
<tr>
<td>Portland Taxi Company</td>
<td>503.256.5400</td>
<td>$40</td>
<td>$1 for each additional person</td>
</tr>
</tbody>
</table>

JANUARY 2009
Appendix I: PSU Travel Policies for Faculty

PSU - DEPARTMENT GUIDE TO BUSINESS AFFAIRS

SECTION 7: TRAVEL

d. Expenses Not Reimbursed - Expenses for these items are not reimbursed unless specifically identified as reimbursable. These include:
- home to office travel.
- deviation from the most direct and usually traveled route.
- expenses because traveler is accompanied by a spouse or family member.

7.013 In-State Rates for Meals & Incidental Expenses and Lodging EFFECTIVE 01/01/08

a. Meals & Incidental Expenses
- In-State Meals: $45 per diem (per person per day); one amount regardless of city. No receipts are required for meals. However, meals that are part of the conference registration package (see Exceptions) must be deducted from the meal per diem.

b. Lodging Expense Rates
- In-State meals and lodging rates are NO LONGER determined by "High" and "Low" cities.
- In-State Lodging: $13 per night at all cities; no receipts required when using per diems. Taxes for lodging are reimbursed as a miscellaneous expense (24999) receipts required, or you may lump it into travel account codes.

- Exceptions: The primary lodging exception is for stay at a Conference Site Hotel. This allows lodging to be reimbursed at "actual and reasonable" cost. Lodging receipts are required when the conference site exception is used. Other exceptions are reviewed on a case-by-case basis.

c. Portland Lodging Rate - For guests, candidates, recruits, consultants, etc. where the university is paying for lodging in Portland, must use University Place at PSU. All lodging/conference events should be held at University Place. If exception is needed please provide written memo to the General Manager of University Place Hotel, Dennis Burkholer, for his approval prior to booking at other accommodation.

Please visit http://www.aux.pdx.edu/ for reservation information.

d. Account Codes - Use In-State account codes 39415, 39416, 39445 or 39446.

e. Non-Traditional Lodging - The rate is $25 per day.

7.014 Out-of-State Rates for Meals & Incidental Expenses and Lodging EFFECTIVE [date]

a. Out-of-State Meals (including incidental expenses) and lodging rates are determined by IRS rules involving "High" and "Low" rates by location (city/county). A list of the high cost locations in the continental U.S. is available from the Travel Desk or from BAO's web site.

- Out-of-State meals, Low City: $45 per person per day. No receipts are required.
- Out-of-State meals, High City: $58 per person per day. No receipts are required.

This rate also applies when an exception is made (i.e., conference site) for lodging at actual and

JANUARY 2009
PSU - DEPARTMENT GUIDE TO BUSINESS AFFAIRS

SECTION 7: TRAVEL

reasonable cost. Again, no receipts are required for meals. However, meals that are part of the conference registration package (see Exceptions) must be deducted from the meal per diem on a pro rata basis. For example, if a banquet is part of the registration package, a dinner amount ($29) is deducted for that day.

b. Out-of-State Lodging
- Low City: $113 per day excluding tax; no receipts are required.
- High City: $195 per day excluding tax; no receipts are necessary.
- Exceptions: The primary exception is to stay at the conference site Hotel. The traveler can receive reimbursement of actual and reasonable costs. Submit original lodging receipts showing occupant’s name, room number, dates of stay, number of persons occupying the room, room rate, lodging taxes, the actual amount paid, and payment method. A brochure listing conference hotels is also required for reimbursement. Regardless of the city, if the conference site exception is used, meals are reimbursed at the high city rate of $58 per day.

c. High Cities nationally include, but are not limited to - Baltimore, Boston, Chicago, Key West, New York City, Philadelphia, San Francisco, Seattle and Washington DC. The revised table is available online at: (http://www.nus.edu/cont-div/fpm/)

d. Account Codes - Use Out-of-State account codes 39515, 39516, 39545 or 39546.

e. Non-traditional Lodging - The per diem rate is $25 when using non-traditional location.

7.015 Foreign Rates for Meals & Incidental Expenses and Lodging

Foreign travel to foreign countries, including Canada and Mexico. It does not include travel in Alaska, Hawaii, Puerto Rico, and U.S. Possessions. Rates for reimbursement follow per diem rates specified by the federal government by country and city. There are no blanket rates; the rates vary by country and city. No receipts are required unless a conference site exception is claimed.

a. Foreign Meals and Incidental Expenses - The per diem rates are determined using the Federal Maximum Travel Per Diem Allowances for Foreign Areas (FASOM 11.05, updated monthly; visit the OUS web page for current rate at: http://spps.state.gov/content.asp?content_id=18485&menu_id=78. In the State Department web site, you have a choice by year, then month within year. The first column shows maximum Lodging; the second column shows maximum Meals and Incidental Expenses (e.g., dry cleaning); and the third column shows the total of the first two or the maximum per diem for that location. Try checking the rates for the location(s) visited or call 5-3733 or 5-4382 or email spps@pdx.edu for assistance in finding the rates.

b. Foreign Lodging Rates - The lodging rates by country and city are from the same table used for meals, see above. For example, London (United Kingdom) has a lodging allowance of $274, meals of $136, total daily allowance of $410 as of 10/1/06; Cambridge (also in UK, but not listed therefore use "Other") is given $187 for lodging, $111 for meals, $298 total per day as of 4/1/04. All rates include tax. If using the per diem rates, no receipts are needed. Conference site hotels are authorized exceptions with receipts and brochures of conference hotels required to complete
Appendix I: PSU Travel Policies for Faculty

PSU - DEPARTMENT GUIDE TO BUSINESS AFFAIRS

SECTION 7: TRAVEL

reimbursement. Non-commercial lodging rate is $25 per day.

c. Travel to Canada or Mexico - The Federal Maximum Travel Per Diem Allowances for Foreign Areas includes travel rates to Canada or Mexico by city.

d. Account Codes - Use Foreign account codes 39615, 39616, or 39645.

e. Currency Conversion Site: http://www.oanda.com/convert/classic

7.016 OCONUS - Alaska, Hawaii, Puerto Rico and U.S. Possessions

Travel to these parts of the United States, Puerto Rico and U.S. Possessions is handled similarly to foreign countries - a table is used to derive the meal and lodging rates by location.

a. Meals and Incidental Expenses - Per diem meal rates are found by location in the Federal Maximum Travel Per Diem Allowances for Alaska, Hawaii, Puerto Rico and U.S. Possessions (FASOM 11.06. See the State Department web site for Non-Foreign Rates at (http://traveldesk.state.gov/pentagon.mil/perdiem/perdiemrates.html). No receipts are needed.

b. Lodging Rates - Lodging rates follow the same tables used for meals, see above. The rates include tax and no receipts are required unless the traveler uses a conference site hotel exemption to claim higher lodging rates. If claiming an exception, provide a receipt and a brochure showing conference hotels. Non-commercial lodging rate is at $25 per day.

c. Account Codes for Alaska and Hawaii - Use Out-of-State account codes, 39515, 39516, or 39545.

d. Account Codes for Puerto Rico and U.S. Possessions - Use Foreign account codes, 39615, 39616, 39645, or 39646.

7.017 Transportation: Transportation expenses incurred while traveling on official business is allowable and may be reimbursed. However, personal expenses, such as repairs, maintenance, or collision damage to private vehicles, may not be reimbursed. Policy clarifies that the state does not pay for physical damage to private cars, trucks, boats, airplanes, etc. used for state business. The following transportation expenses may be reimbursed to the traveler or paid directly to a service provider:

- Private vehicle mileage allowance
- Common carrier fares
- Necessary fees for taxis, limousines, airport shuttles, rental vehicles
- Parking and garage fees

The method of transportation must be authorized either verbally or in writing in advance from within the department. Normally the method of transportation that is the least costly determines the choice. Other factors may enter the decision, including available time of personnel, productive time lost, cost of personnel, possible overtime, cost of extra lodging and meals, public image, etc.

Transportation is classified by type of transportation: private vehicles, mileage allowance and insurance; state-owned vehicles; rental vehicles and insurance; loaned vehicles; and common carriers.

7.018 Private Vehicles Use of a private vehicle is allowable when it is more practical because of cost, efficiency, or work requirements than the choice of a common carrier or using a state vehicle. The drivers of the private vehicles must be in compliance with all State of Oregon Motor Vehicle laws. The policies and procedures specified in the Internal Management Directive for Vehicular Safety, Operation and Maintenance apply to all drivers, including volunteers, of vehicles used for

JANUARY 2009
Appendix I: PSU Travel Policies for Faculty

PSU - DEPARTMENT GUIDE TO BUSINESS AFFAIRS

SECTION 7: TRAVEL

university business.

a. Passengers in Private Vehicles - Employees driving vehicles must complete a certification form. Drivers must receive certification before passengers may be carried. Reimbursement is for the use of the vehicle regardless of the number of passengers carried. The master file for PSU certified drivers is maintained at the Travel Desk (5-3733 or 5-4382).

b. Highway and Local Mileage Reimbursement - Mileage using standard mileage guides is reimbursed; if the most direct route is used for reimbursement. Substantial deviations from standard distances or usual routes and actual odometer reading should be explained. Travel by indirect routes will be reimbursed using the common or direct route. When a trip starts at the employee's residence, use the shorter of the residence-to-destination or official-station-to-destination distances.
   - Private Auto Mileage (personal vehicle only) – must include address of destination(s) traveling to and from employee official working station.
   - Driver registration form should be on file with the Travel Office before claiming mileage reimbursement. The form is available at http://www.pdx.edu/uo.
   - Miles in excess of OUS mileage chart will need justification. Indicate actual odometer reading or print out mapquest mileage of official work station to destination. Indicate area miles and address of destination.

**Effective January 1, 2009. Mileage rate is 55 cents per mile.**

Local travel for official purposes while at overnight destination is allowable, including travel between lodging and restaurants for a traveler's sustenance and health comfort. Travel for personal purposes or entertainment is not reimbursable.

c. Insurance on Private Vehicles - Employees or others authorized to use their private vehicle on official business must maintain a current valid automobile insurance policy covering the vehicle driven and driver. This insurance with limits conforming with Oregon law is considered primary. This means the driver's insurance pays first if there's an accident that causes damage or injury to a third party. Under state insurance rules, the state will cover liability claims above the limits of the driver's policy to the limits of state coverage in ORS 30.260-30.300. The state does not provide coverage for physical (collision) damage to the private vehicle nor for uninsured motorist and personal injury protection. Drivers of private vehicles used for official business should verify their automobile insurance coverage with their insurance carrier or agent.

7.019 **State-Owned Vehicles** State Motor Pool vehicles may be checked out for official business trips. To use a Motor Pool vehicle, the department must apply for a Motor Pool Check Out card. The Portland Motor Pool (971-673-6300) has a larger fleet of vehicles for short- or long-term use at its Swan Island headquarters. State vehicles including university owned vehicles may be used only for official business - no personal use is allowed. Use of state vehicles is not authorized when costs are charged to Agency Funds, except for use of Student Organizations or for other legitimate state business as approved by the university's Director of Business Affairs. Motor Pool charges are billed back to the using department by the Travel Office. Damage due to accident, misuse, neglect, or negligence to a Motor Pool vehicle is chargeable to the department of the driver. Even with state collision insurance, the deductible cost of $2,500 is charged to the renting department.

13

JANUARY 2009

Portland State University

10/11
Appendix I: PSU Travel Policies for Faculty

PSU - DEPARTMENT GUIDE TO BUSINESS AFFAIRS
SECTION 7: TRAVEL

a. Private Use Prohibited - Using a state-owned vehicle for personal or private use or allowing another person to do so is against state law (ORS 283.385) and punishable upon conviction by fine (ORS 283.990). State vehicles may be driven only by university employees, students, or volunteers with a good driving record and with a valid driver's license. Employee spouses and other persons whose travel is directly related to the required business travel may be carried as passengers, not as drivers. No other family members are permitted in the vehicle. No children are permitted except as wards of the state. No hitchhikers or pets are allowed in the vehicle.

b. Overnight Parking at Employee's Residence - A state vehicle may be kept overnight at a driver's residence when doing so is approved in advance by the driver's department head. Remember: the public is always curious about who's using a state vehicle and why it is being used.

c. Driver Safety - Drivers of state vehicles must obey all road and traffic laws and stay within the posted speed limits. Vehicles are to be driven in a manner conducive to safety, economy, and good public relations. Members of the general public are prone to report speeding and unsafe state vehicles. These reports can form the basis of reprimand or discipline against an errant driver.

7.020 Rented Vehicles - Rental costs of vehicles (cars, trucks, boats or aircraft) may be reimbursed or direct billed. Rental should be considered only when regular means of transportation are unavailable or inappropriate for the particular use intended. Rental cars may be used in conjunction with travel by common carrier when use is reasonable and authorized in advance. Examples: Flying to a city and renting a car to visit recruiters and their families would be allowable. When flying to a city for a conference at the conference site hotel where the hotel has free or nominal shuttle service, the cost of renting a car would appear to be a personal benefit and not reimbursable.

a. Size of Vehicles - Rental cars should be economy or compact size. Larger vehicles are justified for groups of three or more. The cost of upgrades to large or luxury vehicles or to accommodate family members is a personal expense, not reimbursable from PSU funds. Athletics, because of the size of personnel and recruits, is allowed to rent mid-size cars as their nominal vehicle.

b. Rental Car Companies - Rental rates vary between rental car companies and by city. Call several to obtain the best rates for the particular destination. PSU have a contract with Enterprise Rent A Car which is centrally billed through PSU using your index number. PSU Corporate Account number with Enterprise is DB46W68. This contract covers CDW coverage, therefore, do no buy extra. Please provide this corporate account number, index number and contact information when making reservation. The Travel Desk has credit cards with several of the largest rental car firms (National, Budget). These cards can be checked out so that travelers can have the charges direct billed to PSU. If the traveler uses his or her Corporate VISA Card for payment of the rental contract, liability or collision damage will be covered through VISA.

c. Insurance on Rented Vehicles - If rented for official business and renting a vehicle that is not part of a master price agreement that includes insurance, you are encourage to purchase the Limited Damage Waiver (LDW) or Collision Damage Waiver (CDW). If the LDW or CDW is available and not purchased by the agency at the time of rental, the deductible doubles from $2,500

JANUARY 2009
Appendix I: PSU Travel Policies for Faculty

PSU - DEPARTMENT GUIDE TO BUSINESS AFFAIRS

SECTION 7: TRAVEL

to $5,000 in the event of a loss. However, if a vehicle is for personal use, the driver carries the insurance through his/her personal automobile insurance policy. **Drivers of rental vehicles should check their own auto policies before planning to rent.**

Travelers should rent vehicles using their US Bank Corporate VISA cards because the CDW is primary when renting with this card. The traveler whose rental car is involved in an accident must report the accident (this is potential liability to the state) to the Business Affairs Office, 5-5340, immediately. And if you are using your US Bank Corporate Visa Card, accident report must be done within 20 days.

7.021 Loaned Vehicles Use of loaned vehicles may be authorized when it benefits the university. Loaned vehicles must have a safety check before being used - this is especially important with use by student groups. The state provides liability and collision coverage on the loaned vehicle only if the university has agreed in writing to accept responsibility for liability and damage to the vehicle. The loaned vehicle must be used for official business. For additional information, contact the Risk Coordinator at 5-5340. If any use of the vehicle is personal (day care, grocery store), the driver's personal auto insurance becomes primary. **Drivers should check first with their own auto insurance before driving a loaned vehicle.**

7.022 Common Carriers Transportation by means of common carrier is the usual choice when it is more appropriate and economical than travel using state or private vehicles. Common carriers are usually preferred for out-of-state travel. Actual cost is paid or reimbursed for rail, bus, or airline fares.

a. **Railroads** - Maximum fares on U.S. trains are regular first-class fares. A roomette is allowed when an overnight Pullman accommodation is needed. A bedroom is allowed if no roomette is available, or if special accommodations are approved because of the trip's nature or the traveler's health requires it. Receipts are required.

b. **Buses** - Scheduled or charter buses may be used. Receipts are required, except city buses and subways.

c. **Taxis, Limousines, and Airport Shuttles** - All may be used. Receipts are not required unless it is over $75.00, but the cost for each must be itemized for reimbursement.

7.023 **Airlines** Airline travelers are expected to choose the lowest cost flight and airline, including all cost factors, that meet the schedule needs of the traveler.

a. **Awards** - All employees are required to travel using routes, schedules and airlines that provide the lowest rates and most efficient travel. The traveler cannot prefer one carrier over another to gain awards. OUS does not require recapture of airline bonuses awarded employees for frequent flyer miles; the cost of record-keeping outweighs any monetary benefit. Frequent flyer bonuses may be used by employees as they choose unless contrary to the terms of a grant or contract.

Employees are encouraged to use any bonuses in conjunction with official business.

b. **Payment in lieu of Air Travel** - A traveler may choose, with advance approval, to drive to the business destination rather than fly. The cost of reimbursement is the **cheaper** of the two methods.

15
JANUARY 2009
Appendix I: PSU Travel Policies for Faculty

PSU - DEPARTMENT GUIDE TO BUSINESS AFFAIRS

SECTION 7: TRAVEL

For example, a traveler choosing to drive to San Francisco (636 miles) could be reimbursed the lesser of mileage cost: 636 x 2 x $0.485 = $616.92 vs. airfare: $56 City-Pair x 2 = $112 (+ tax & ticket fee). In other cases private vehicle mileage might be the cheaper method to determine the amount to reimburse.

c. Split Billings - The cost of travel, usually airfare, may be split by the amount paid by PSU and the remaining share paid by the traveler except for City Pair Airfare (Government Fare). Often, departments have limited travel budgets and can provide only partial support of the trip's cost. The travel agents used by PSU can assist the traveler in arranging a split payment. The traveler has to deliver a personal check to the travel agent or use his or her personal credit card when the ticket is booked. This also applies when the traveler is accompanied by a spouse or companion, the spouse or companion’s ticket must be paid for personally - never charged to the department. See also City-Pair Fares, 7.024c., below.

7.024 Contracted Travel Agencies - PSU has contracted with three travel agencies to provide travel services to our travelers. We offer three so using departments have an option or choice of which to use. All are contracted to provide a full range of services. The agencies have been instructed to offer our travelers the lowest available fares, given the limitations of departure and arrival time frames. To book air travel, give the agent your index code and account code. The airfare costs are billed to your VISA “Ghost Card” and paid centrally to US Bank at the end of the month. The travel agency sends a list of the sold tickets and travelers, with the accounting data, to the Travel Desk where a journal voucher is prepared charging the ticket cost to the traveler's Index.

The travel agencies are: Azumano/Away Travel, Journeys Travel and Uniglobe Spectrum. These contracts are administered through Purchasing; call 5-3733, 5-4382 or vsap@pdx.edu if you encounter any problems or questions in using these agencies. All travelers, including candidates and reimbursable contractors, should utilize any of the contract travel agencies.

<table>
<thead>
<tr>
<th>Contract Travel Agency</th>
<th>Phone</th>
<th>Toll Free</th>
<th>After hour</th>
<th>Fax</th>
<th>Contact/Rep</th>
<th>Fees</th>
</tr>
</thead>
<tbody>
<tr>
<td>Azumano</td>
<td>866-291-0460</td>
<td>866-291-0460</td>
<td>877-840-0187</td>
<td>800-713-5432</td>
<td>Tony Fuerte</td>
<td>$29.00</td>
</tr>
<tr>
<td>Journeys Travel</td>
<td>503-226-7200</td>
<td>866-440-1072</td>
<td>800-664-8594</td>
<td>Client Access Code A1A0V</td>
<td>Linda Lane</td>
<td>$32.50</td>
</tr>
<tr>
<td>Uniglobe Spectrum</td>
<td>503-620-0620</td>
<td>800-544-2575</td>
<td>800-787-3997</td>
<td>503-624-0987</td>
<td>Michelle Maidonado</td>
<td>$25.00</td>
</tr>
</tbody>
</table>

d. US Bank Ghost Cards - Each travel agency has a unique US Bank VISA Procurement Card (called "ghost cards" because they exist only on paper) to charge our cost of airline tickets to the various airline vendors.

e. Lost Savings Reports - Each of the travel agencies produces a report showing the cost of each ticket and whether the fare paid was the lowest fare. The report shows if the traveler refused the lowest fare and the reason for refusing the lowest fare. Historically, PSU travelers have preferred
Appendix I: PSU Travel Policies for Faculty

PSU - DEPARTMENT GUIDE TO BUSINESS AFFAIRS

SECTION 7: TRAVEL

the lowest fares with only a small percentage opting for a higher fare. Travelers or departments may be asked to explain the reason for taking the higher fare noted in the report.

7.025 Buying Airfares - Call any of the contracted agencies with a proposed itinerary. The agent should give you several choices of routes, airlines, departure and arrival times, and prices. Travelers are expected to travel by the most economical method. This usually means accepting the lowest available fare. Travelers are not allowed to prefer one airline over another unless the separate fares are equal or the routing saves time. Obviously, if one airline offers a direct flight at the same fare that a second airline charges for a two-segment route with a stop to change planes, the first airline would be preferred. First Class fares are not allowed.

a. Competitive Fares - Use any of our three agencies to provide fare quotes. Don't hesitate to call a second agency to see if you can obtain a better quote. Warning: Airfares change without warning, It isn't uncommon to have fares change from the time the quote was obtained to when the ticket is booked. Therefore, one agent may give a different fare quote than another. Be sure to ask for a quote based on the same specifications - the day and approximate time of departure and the needed arrival time being the most important. There are two ways to compare fares: First, compare only with "apples to apples" where the same specific times and same airline are compared between the travel agents. Second, you may find comparing the cost of using a different airline and routing through different hubs to give still better pricing. This compares "apples with oranges."

b. Using Other Travel Agents - Besides the three contract travel agencies, travelers may obtain fare quotes from other travel agencies, the airlines themselves, or from internet sources. However, Azumano Travel, Journeys, or Uniglobe Travel must be contacted as well to offer a quote on the same itinerary as the outside agency. If the outside agency quotes at least 5% lower than any our contract agencies, the department may book the ticket and the traveler pays using his or her Corporate VISA Card or personal card Other exceptions: International Travel (try to call Azumano, Journeys, or Uniglobe initially for one quote); group travel (as few as 5 or more); and charter groups.

c. City-Pair Fares - Through a series of state contracts with various airlines, we have the ability to buy unrestricted airfares to various cities - called "City-Pairs" - from or to Portland (PDX), Boise, Eugene, and Medford. These fares allow the traveler to book a ticket up to the day of the flight, fly with no Saturday night stay, and cancel or rebook the ticket - all without a penalty. Normally, excursion coach fares require up to 21-day advance purchase, a Saturday night stay, and little or no allowance to cancel the ticket. A list of the city-pairs can be obtained from the Business Affairs web page. These special fares are only available from our three travel agencies. A new list of city-pair fares becomes available each fiscal year, for travel beginning in August. Note: The travel agents will not split-hill these fares. Spouse or companions accompanying University travelers may not buy City-Pair tickets; only persons engaged in official University business may use the City-Pair state contracts. The City-Pair fares are issued under a State Department of Administrative Services (DAS) contract. DAS indicates that contractors, receiving payment for consulting or other services, cannot use the City-Pairs.

d. Booking Airfares - Once you have determined the best route, itinerary, and price, commit to the purchase by booking the flight with the travel agent. The ticket is paid for by telling the agent your

17
JANUARY 2009
Appendix I: PSU Travel Policies for Faculty

PSU - DEPARTMENT GUIDE TO BUSINESS AFFAIRS

SECTION 7: TRAVEL

Index Code and FIS Account Code. The travel agency charges our guest card to pay the airline and sends a list of purchased tickets to the Travel Desk at the end of the month to be journal voucher to the ordering department's Index.

c. Airfare Reimbursements – Airfare will be reimbursed upon completion of trip along with other expenses. Reimbursements to the traveler require either: 1) A copy of the on-line documentation showing the payment method and the itinerary or 2) Documentation showing the traveler paid the airfare (i.e. a credit card statement with the charge highlighted) and the itinerary. Be sure to document the other quotes on the TAF and attached written documentation with the travel reimbursement form.

7.026 Travel Reimbursements Following each trip, the traveler (it's presumed the traveler is claiming costs for himself/herself, if claiming payments on behalf of others, actual receipts must be shown and the others must be named and certify they received the meals) should complete an expense report listing the allowable expenses by item. The reimbursement should be turned in within 60 days (or sooner at fiscal year-end or at the end of a grant) after completion of the trip. After 60 days, a written explanation is required. Travel Reimbursement forms turned in to the Travel Desk is usually cleared, with the check mailed to the claimant, within one week. Accounting now has a method of directly depositing reimbursements to an employee's bank accounts.

a. How to Complete the Form - The PSU Travel Reimbursement Request can be filled from the Business Affairs web site that the traveler (claimant) completes within 10 days (or current to 6/30/XX at fiscal year-end) following a trip. For background, every claimant (faculty, student, guest or contractor) has to be a vendor in FIS before a reimbursement check can be produced. Therefore, the name, address, and social security/vendor number must be accurate. These elements are explained: SEE PAGE 20.
Appendix I: PSU Travel Policies for Faculty

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PSU - DEPARTMENT GUIDE TO BUSINESS AFFAIRS
SECTION 7: TRAVEL

TRAVEL REIMBURSEMENT REQUEST

<table>
<thead>
<tr>
<th>Name</th>
<th>Employee Official Station</th>
</tr>
</thead>
<tbody>
<tr>
<td>PSU ID</td>
<td>PSU or Portland for on-campus employee, complete home address for non-employee, or, sometimes, office address for a non-employee candidate</td>
</tr>
<tr>
<td>Address</td>
<td>Current mailing address</td>
</tr>
</tbody>
</table>

- [ ] PSU Employee
- [ ] Student
- [ ] Other

<table>
<thead>
<tr>
<th>Title</th>
<th>PSU Department</th>
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<th>Phone No.</th>
</tr>
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<tbody>
<tr>
<td>Traveler's title: professor, project manager, visiting candidate, etc.</td>
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<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Date</th>
<th>Departure/arrival time</th>
<th>Itinerary</th>
<th>Miles</th>
<th>Amt</th>
<th>Per Diem</th>
<th>Bride</th>
<th>Lunch</th>
<th>Dinner</th>
<th>Lodging</th>
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<tbody>
<tr>
<td></td>
<td></td>
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<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- Request date travel commenced
- Time travel started, usually when traveler left official position
- Where did traveler go?
- Rate: $ 50/mile

<table>
<thead>
<tr>
<th>End of trip date</th>
<th>Time travel ended = arrived at PDX</th>
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</thead>
</table>

Sub-Total

<table>
<thead>
<tr>
<th>Date</th>
<th>OTHER EXPENSES: Transportation fares, registration fees, telephone calls, etc.</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Itemize additional travel expenses: tolls, parking, phone calls, taxis, etc.</td>
</tr>
</tbody>
</table>

- Travel Advance: [ ] Yes [ ] No [ ] Sub-Total:

GRAND TOTAL:

<table>
<thead>
<tr>
<th>Index Code</th>
<th>Account Code</th>
<th>Payment Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>List Index Code</td>
<td>Account Code</td>
<td>$</td>
</tr>
</tbody>
</table>

Purpose (Required on all requests):

Indicate business purpose of each trip. How does it benefit PSU?

I certify that the expenses claimed above are actual and reasonable, incurred in the performance of my official duties.

Thecharges are therefore just and that no amounts have been or will be submitted elsewhere.

JANUARY 2009

---

Portland State University

10/11
Routing of TRR - Retain a copy in the department and route the original copy to the Travel Desk in the Accounting Office, mail code BO-SAS.

Account Codes for Travel - Travel uses unique account codes in the 39XXX series. The codes are broken down for program-related travel between employee and non-employee and between in-state, out-of-state, and foreign destinations. Also, these are three codes for employee training travel - sending an employee to a workshop to learn a new process, for instance, as opposed to travel to an annual professional meeting that may offer discussion of particular topics (program). The basic account codes are:

<table>
<thead>
<tr>
<th>Description</th>
<th>In-State</th>
<th>Out of State</th>
<th>Foreign</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee Travel</td>
<td>39415</td>
<td>39515</td>
<td>39615</td>
</tr>
<tr>
<td>Employee Training</td>
<td>39416</td>
<td>39516</td>
<td>39616</td>
</tr>
<tr>
<td>Non-Employee Travel</td>
<td>39445</td>
<td>39545</td>
<td>39645</td>
</tr>
<tr>
<td>Group/Team Travel</td>
<td>39446</td>
<td>39546</td>
<td>39646</td>
</tr>
<tr>
<td>Conference Registration</td>
<td>28601</td>
<td>28601</td>
<td>28601</td>
</tr>
<tr>
<td>Training Registration</td>
<td>29049</td>
<td>Fees to PSU or other OUS schools</td>
<td></td>
</tr>
<tr>
<td>Interagency Training</td>
<td>29051</td>
<td>Training from other Oregon State Agency</td>
<td></td>
</tr>
<tr>
<td>Outside Training</td>
<td>29052</td>
<td>Training from outside; PCC, L&amp;C, Consultant</td>
<td></td>
</tr>
</tbody>
</table>

Employee Moving Expenses - PSU can reimburse or pay vendors directly on behalf of new employees for their moving expenses. These rules are consistent with IRS rules. Some expenses may be reimbursed under the travel rules (accountable plan) with no tax consequences, while other expenses are considered taxable and reported as miscellaneous income (1099) or paid through payroll with deductions. Call the Travel Desk (5-3733) beforehand.

50 Mile Test: Moving mileage will be reimbursed if the 50 Mile Test has been met. If your new main job is within 50 miles of your former residence than your old job was, then it is non-taxable. If your new main job is at least 50 miles farther from your former residence than your old job was then it is taxable. The first 2.4 mile is non-taxable and the remaining 31.6 mile is taxable. **Moves not meeting the 50 mile test are not reimbursed.**

Moves exceeding $5,000 require a purchase order. Use account code 10790 (moving) and account code 10780 (house hunting, temporary living) [http://www.ous.edu/con_div/fusom/sec10/10H304602.php](http://www.ous.edu/con_div/fusom/sec10/10H304602.php)

Questions? Questions about travel policy, rules, rates, and interpretation: Questions to travel Desk at 5-3733 or 5-4382 or Specialized Accounting Services supervisor at 5-4731.

JANUARY 2009
APPENDIX II: PROGRAM PROPOSAL TEMPLATE

Portland State University International Faculty Led Programs

Academic Outline & Proposal

The proposal and review process for international faculty led programs has two steps.

**Academic Review**

Faculty are first asked to provide information about the academic content of the proposed program and the course structures and activities (whether on-campus or abroad) as they relate to the academic content. This proposal will be reviewed by the International Faculty Led Program review committee, a group of faculty with experience and interest in developing and leading these programs. The committee’s focus is 1) to ensure consistently high academic standards across all international faculty led programs and 2) to ensure that the program’s international setting is adequately incorporated into the course structure in support of the learning outcomes.

**Education Abroad Review**

After a program has been approved by the committee, proposing faculty will submit materials detailing the program schedule, logistics, contracting needs, costs and risk to the Office of Education Abroad. Education Abroad’s review focuses on a program’s logistical feasibility, cost, health/safety, or other non-academic factors.

If both the faculty committee and Education Abroad approve the program, Education Abroad will use the materials from both submissions to develop an information and application packet for students and begin program outreach and marketing.

**Due Dates**

<table>
<thead>
<tr>
<th>Review/Program Dates</th>
<th>Summer</th>
<th>Fall</th>
<th>Winter</th>
<th>Spring</th>
</tr>
</thead>
<tbody>
<tr>
<td>Academic Submission Due</td>
<td>November 1</td>
<td>December 30</td>
<td>May 1</td>
<td>October 1</td>
</tr>
<tr>
<td>Review Decision by</td>
<td>November 15</td>
<td>January 21</td>
<td>May 21</td>
<td>October 15</td>
</tr>
<tr>
<td>Schedule and Logistics Due</td>
<td>December 15</td>
<td>February 28</td>
<td>June 15</td>
<td>November 15</td>
</tr>
<tr>
<td>Student Application Deadline</td>
<td>March 26</td>
<td>July 2</td>
<td>October 8</td>
<td>January 21</td>
</tr>
<tr>
<td>Earliest Program Departure</td>
<td>June 10</td>
<td>September 26</td>
<td>January 3</td>
<td>March 28</td>
</tr>
<tr>
<td>---------------------------</td>
<td>---------</td>
<td>--------------</td>
<td>-----------</td>
<td>---------</td>
</tr>
</tbody>
</table>

PSU Campus-Wide Internationalization Learning Outcome

Please reference these learning outcomes in section 3 of the attached form. Students will understand the richness and challenge of world cultures and the effects of globalization, and will develop skills and attitudes to function as “global citizens.”

International Learning Outcomes (DRAFT)

Knowledge:

K. 1 Demonstrates knowledge of global issues, processes, trends and systems (e.g. economic and political interdependency among nations; environmental-cultural interaction; global governance bodies).

K. 2 Demonstrates an understanding of his/her culture in global and comparative context—that is, recognizes that his/her culture is one of many diverse cultures and that alternative perceptions and behaviors may be based in cultural differences.

K. 3 Demonstrates an understanding of how his/her field (academic/professional) is viewed and practiced in different international contexts.

Skills:

S. 1 Uses diverse cultural perspectives and frames of reference to think critically and solve problems.

S. 2 Uses information from other languages and other cultures: to enhance learning in other academic areas; as a window to cultural understanding; or to enhance language and cultural knowledge.

S. 3 Interprets issues and situations from more than one cultural perspective.

Attitudes:

A. 1 Can articulate differences among cultures; demonstrates tolerance for diverse viewpoints that emerge from these differences.

A. 2 Demonstrates an ongoing willingness to seek out international or intercultural opportunities.
## Academic Outline and Proposal

### 1. Overview

<table>
<thead>
<tr>
<th>Program Title:</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Course title(s) if different from above:</td>
<td></td>
</tr>
<tr>
<td>Course number(s):</td>
<td></td>
</tr>
<tr>
<td>Faculty:</td>
<td></td>
</tr>
<tr>
<td>Phone:</td>
<td>E-mail:</td>
</tr>
<tr>
<td>Short bio for faculty including relevant country expertise and experience.</td>
<td></td>
</tr>
<tr>
<td>Is this program related to ongoing faculty, graduate student research/ grants or university initiatives?</td>
<td>____ Yes ____ No, If yes, please describe:</td>
</tr>
<tr>
<td>Term to be offered</td>
<td>Year:</td>
</tr>
<tr>
<td>Courses taught in-load?</td>
<td>Are you requesting that tuition be waived?</td>
</tr>
<tr>
<td>Course description(s):</td>
<td></td>
</tr>
<tr>
<td>____ Yes  ____ No</td>
<td>____ Yes  ____ No</td>
</tr>
<tr>
<td><strong>Course learning outcomes:</strong></td>
<td></td>
</tr>
<tr>
<td>-------------------------------</td>
<td>--</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Course prerequisites:</strong></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Recommended: _____</td>
<td></td>
</tr>
<tr>
<td>Required: _____</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Open to:</strong></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Sophomores: _____</td>
<td>Juniors: _____</td>
</tr>
<tr>
<td>Seniors: _____</td>
<td>Grad Students: _____</td>
</tr>
<tr>
<td>Freshman: _____</td>
<td></td>
</tr>
<tr>
<td>(By permission of Education Abroad, only)</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Minimum GPA:</strong></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>2.75 (typical undergraduate): _____</td>
<td></td>
</tr>
<tr>
<td>3.0 (typical graduate): ________</td>
<td></td>
</tr>
<tr>
<td>Other: ________</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Preferred enrollments:</strong></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Minimum: ________</td>
<td>Maximum: ____________</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>International dates:</strong></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Start: ____________</td>
<td>End: ____________</td>
</tr>
</tbody>
</table>

| **Proposed credits:** |  |
### Course hour distribution (% time):

<table>
<thead>
<tr>
<th>Pre-departure</th>
<th>On-site:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Classroom:  _____</td>
<td>Classroom:  _____</td>
</tr>
<tr>
<td>Lab:  _____</td>
<td>Lab:  _____</td>
</tr>
<tr>
<td>Studio:  _____</td>
<td>Language Study:  _____</td>
</tr>
<tr>
<td>Site Visits:  _____</td>
<td>Studio:  _____</td>
</tr>
<tr>
<td>Service Learning:  _____</td>
<td>Site Visits:  _____</td>
</tr>
<tr>
<td>Online:  _____</td>
<td>Service Learning:  _____</td>
</tr>
<tr>
<td>Other:  _____</td>
<td>Online:  _____</td>
</tr>
<tr>
<td></td>
<td>Other:  _____</td>
</tr>
</tbody>
</table>

### 2. International Rationale & Integration

<table>
<thead>
<tr>
<th>Why should this course be offered abroad?</th>
</tr>
</thead>
<tbody>
<tr>
<td>What course activities are anticipated to integrate the international location?</td>
</tr>
<tr>
<td>How will host country nationals be tapped to support learning objects and skills development?</td>
</tr>
<tr>
<td>Does this program include a service learning component? If so, please provide an overview of the service learning host(s) and student activities.</td>
</tr>
<tr>
<td>Does this program provide positive benefits or outcomes to the host community? Please describe.</td>
</tr>
</tbody>
</table>

### 3. Internationalization Learning Outcomes (see page 2)
<table>
<thead>
<tr>
<th>What are the anticipated learning outcomes?</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>What skills will students develop?</td>
<td></td>
</tr>
</tbody>
</table>

## 4. Approvals

<table>
<thead>
<tr>
<th>Department Chair:</th>
<th>Date:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dean:</td>
<td>Date:</td>
</tr>
</tbody>
</table>
APPENDIX III. IFL BUDGET TEMPLATE

Portland State University International Faculty Led Programs

Schedule, Logistics and Budget

Submission Deadlines:

<table>
<thead>
<tr>
<th>Review\Program Dates\ Term</th>
<th>Summer</th>
<th>Fall</th>
<th>Winter</th>
<th>Spring</th>
</tr>
</thead>
<tbody>
<tr>
<td>Schedule, Logistics and Budget Due</td>
<td>December 15</td>
<td>February 28</td>
<td>June 15</td>
<td>November 15</td>
</tr>
</tbody>
</table>

Schedule and Logistics

Description:
Please provide a description of your program including: academic content, excursions, field experiences, service learning, etc. (3-4 paragraphs).

Program Partners:
Please list any individuals or organizations either in the US or your host country that will assist with the planning, offer course content, or provide service learning opportunities, including a brief description of them and the service(s) they will provide. (Weblinks are appreciated, if available.)

Affiliations:
Do any of the program faculty hold any paid or unpaid appointments at any of the partner institutions?

____ Yes  ____ No, If yes, please describe:
Service Providers: Logistics planning such as lodging and transportation arrangements, site visits, guest speakers, service learning opportunities are typically completed by program faculty with the assistance of Education Abroad. To reduce the amount of time that faculty spend coordinating program logistics, Education Abroad can contract with for-profit service providers in-country who will do all of the logistics and some or all of the academic coordination for these programs. However, service providers add their own profit margins and require an extra 4-6 weeks planning time in order to solicit and review RFPs.

Do you want Education Abroad to request packages and quotes from one or more service providers?

___ Yes ___ No Preferred Provider(s), if any:

________________________________________________________

Itinerary

Schedule Narrative:

Please provide a one to two paragraph narrative overview of the program schedule. For example, “Participants will spend the first week in Managua developing an understanding of the socioeconomic conditions there, before proceeding to rural villages to explore rural electrification efforts there ...” And/or “Daily activities will include class discussions, followed by guest speakers or visits to related sites. Lunch will be the big group meal of the day and most evenings will be unscheduled.

Daily Schedule

Please include the following information: city/location, travel days, site visits, speakers, planned class sessions, planned free time and/or other relevant group activities. It is understood that this will change as the program planning progresses.

<table>
<thead>
<tr>
<th>Day</th>
<th>Activity</th>
<th>City</th>
</tr>
</thead>
<tbody>
<tr>
<td>Day 1</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Day 2</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Day 3</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Day 4</td>
<td></td>
<td></td>
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<tr>
<td>Day 5</td>
<td></td>
<td></td>
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<tr>
<td>Day 6</td>
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<tr>
<td>Day 7</td>
<td></td>
<td></td>
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<tr>
<td>Day 8</td>
<td></td>
<td></td>
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<tr>
<td>Day 9</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Day</td>
<td></td>
<td></td>
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<tr>
<td>--------------</td>
<td>---</td>
<td></td>
</tr>
<tr>
<td>Day 10</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Day 11</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Day 12</td>
<td></td>
<td></td>
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<tr>
<td>Day 13</td>
<td></td>
<td></td>
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<tr>
<td>Day 14</td>
<td></td>
<td></td>
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<tr>
<td>Day 15</td>
<td></td>
<td></td>
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<tr>
<td>Day 16</td>
<td></td>
<td></td>
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<tr>
<td>Day 17</td>
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<tr>
<td>Day 18</td>
<td></td>
<td></td>
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<tr>
<td>Day 19</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Day 20</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Day 21</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Insert additional rows as needed

**Strenuous or higher risk activities:**

Please detail any planned activities that may be considered strenuous or contain increased elements of risk; e.g. hiking over particularly hilly terrain, physical labor, climbing, swimming, etc..

Please provide an academic rationale for any strenuous or higher risk activities listed above.

**Environmental factors:**

Please indicate and describe any environmental factors (e.g. high altitude, sun exposure, airborne pollution, heat, etc.) that may negatively impact participants.

**Housing**
<table>
<thead>
<tr>
<th>Students will stay in: (Check all that apply)</th>
<th>Housing will be arranged by:</th>
</tr>
</thead>
<tbody>
<tr>
<td>_____ Hotel</td>
<td>_____ Faculty</td>
</tr>
<tr>
<td>_____ Homestay</td>
<td>_____ Education Abroad</td>
</tr>
<tr>
<td>_____ Dormitory</td>
<td>_____ Program Partner</td>
</tr>
<tr>
<td>_____ Rented Apt/House</td>
<td>_____ Service Provider</td>
</tr>
</tbody>
</table>
Draft Budget

Please include estimates of all program costs. Education Abroad will review your budget and will add required administrative items such as international insurance and university overhead charges, etc. Education Abroad will provide an official cost range based on minimum and maximum enrollments. Please do not announce any cost information other than the official Education Abroad estimate.

An interactive spreadsheet that can model per student program fees based on various enrollments and cost elements is available upon request.

<table>
<thead>
<tr>
<th>Item</th>
<th>Cost per faculty/staff</th>
<th>Total Cost for all Faculty/Staff Travelers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Airfare</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Visa</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Immunizations</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Lodging</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Per diem meals and incidentals</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Entrance fees</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other: ____________________</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Faculty/Staff Expenses Subtotal

Program Partners/Honoraria

<table>
<thead>
<tr>
<th>Name/Organization</th>
<th>Service to be provided</th>
<th>Cost</th>
</tr>
</thead>
</table>
Program Partners/Honoraria Subtotal

General Program Expenses

<table>
<thead>
<tr>
<th>Item</th>
<th>Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>In-country cell phone</td>
<td>$100.00</td>
</tr>
<tr>
<td>On-campus marketing materials</td>
<td>$50</td>
</tr>
</tbody>
</table>

Direct Expenses Subtotal

Student Expenses

Note: these elements are listed per student.

<table>
<thead>
<tr>
<th>Item</th>
<th>Note</th>
<th>Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accommodations (1)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Accommodations (2)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Accommodations (3)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Program provided meals</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Entrance fees</td>
<td></td>
<td></td>
</tr>
<tr>
<td>In-country transportation</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Language study</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Student Expenses Subtotal
<table>
<thead>
<tr>
<th>Item</th>
<th>Note</th>
<th>Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>International airfare</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Visa fees</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Immunizations</td>
<td></td>
<td>$200</td>
</tr>
<tr>
<td>Non-programmed meals</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Spending/sightseeing funds</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Airport exit fees</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Student Out of Pocket Subtotal</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
APPENDIX IV: SAMPLE IFL STUDENT APPLICATION

PSU Education Abroad Application

Bring your completed application to the Office of International Affairs/Education Abroad Office, East Hall, 632 SW Hall, Room 101, or mail to Office of International Affairs, PO Box 751, Portland, OR 97207-0751. Typed applications are preferable.

Application Components:

1) Transcripts: (Unofficial transcripts are acceptable.)
   a) All Students: Include transcripts for all courses taken at Portland State.
   b) Undergraduate Transfer Students: Submit transcripts from your prior institutions for your last 90 credits of coursework attempted.
   c) Graduate Students: Include transcripts for all graduate coursework attempted.

2) References: One letter of reference is required from all applicants. Please give the confidential reference forms provided in the application to someone who can objectively evaluate you. The reference should be from an instructor, however references from former instructors, an employer, youth leader, living group adviser, or counselor will also suffice. Do not use peers or family friends as reference. Please note that the reference form is to be returned to PSU in signed, sealed envelopes.

3) Interviews: All students will be required to complete an in-person study abroad interview with a study abroad advisor. Interviews will be scheduled after completed applications are received.

4) Application Fee: All students $50.

Once your application file is complete, you will be notified when and with whom to arrange an appointment for a personal interview. A decision on your application will not be issued until all of the above components are received and your interview is completed. Please note that instructor approval is required and the final decision for acceptance will be made by the instructor AFTER you have completed your personal interview with an application committee in the Office of International Affairs.

Questions? Please feel free to call the PSU Office of International Affairs/Education Abroad Office, 503/725-5309.
# Education Abroad Application

**Program:**

<table>
<thead>
<tr>
<th>Last Name</th>
<th>First Name</th>
<th>MI</th>
<th>PSU ID#</th>
</tr>
</thead>
</table>

## Contact Information

<table>
<thead>
<tr>
<th>Preferred E-mail</th>
<th>Cell Phone</th>
<th>Home Phone</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Current Address</th>
</tr>
</thead>
<tbody>
<tr>
<td>City</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Permanent Address (if different from above)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Permanent City</td>
</tr>
</tbody>
</table>

## Academic & Registration Information

- **Class Standing (at time of program):**
  - [ ] Freshman
  - [ ] Sophomore
  - [ ] Junior
  - [ ] Senior
  - [ ] Non-Degree
  - [ ] Post-Bach
  - [ ] MA/PhD

- **Major:**

- **Minor:**

- **GPA:**

- **Are you planning to use financial aid?**
  - [ ] Yes
  - [ ] No

<table>
<thead>
<tr>
<th>Languages other than English</th>
<th>Highest course completed (if applicable)</th>
<th>Fluency</th>
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<tr>
<td></td>
<td></td>
<td>Beginnings</td>
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<tr>
<td></td>
<td></td>
<td>Intermediates (daily needs)</td>
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<tr>
<td></td>
<td></td>
<td>Fluent (socially conversant)</td>
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<td></td>
<td></td>
<td>Native</td>
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</table>

|                             |                                        | Beginnings  |
|                             |                                        | Intermediates (daily needs) |
|                             |                                        | Fluent (socially conversant) |
|                             |                                        | Native    |
**Former Colleges and Universities:**

**UNDERGRADUATE STUDENTS:** Please list below and provide unofficial or official transcripts for all colleges and universities attended.

**GRADUATE STUDENTS & POST-BAC:** Please list below and provide unofficial or official transcripts for your degree granting undergraduate institution as well as all graduate level coursework completed.

<table>
<thead>
<tr>
<th>College or University Name</th>
<th>Dates Attended (mm/yyyy - mm/yyyy)</th>
<th>Degree(s) Earned or # of credits completed</th>
<th>GPA</th>
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**Prospective Traveler Information**

Note: Passports must be valid for at least 6 months prior to the student's intended date of return to the US.

<table>
<thead>
<tr>
<th>Passport #</th>
<th>Passport Country</th>
<th>Passport Expiration</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>(Note: most countries require that passports be valid for 6 months after the traveler's intended return)</td>
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</table>

<table>
<thead>
<tr>
<th>Date of Birth (MM/DD/YYYY)</th>
<th>Place of Birth (State, Country)</th>
<th>Gender</th>
</tr>
</thead>
<tbody>
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<td></td>
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<td>F</td>
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<td></td>
<td></td>
<td>M</td>
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</tbody>
</table>

**International Travel Experience**

<table>
<thead>
<tr>
<th>Country</th>
<th>Dates (mm/yyyy - mm/yyyy)</th>
<th>Type of travel (e.g., tourism, study, work, gov't)</th>
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</thead>
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**FOR SERVICE LEARNING PROGRAMS ONLY**

Please list any relevant work experience:

<table>
<thead>
<tr>
<th>Employer</th>
<th>Dates (mm/yyyy - mm/yyyy)</th>
<th>Position</th>
<th>Duties</th>
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<tbody>
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</tbody>
</table>
Statement of Purpose (1-2 pages)
On a separate piece of paper, please respond to the following:

1) How will your participation in this program contribute to your educational, career and/or personal goals?
2) Given the collaborative nature of the program, what skills and personal qualities do you bring to the program that will contribute to the success of the program?
3) What do you feel is the biggest challenge or factor that may impact your ability to achieve your goals in this program?

Affirmations & Signatures
(Please print all application pages then sign below and return the completed application to East Hall Room 101)

The selection committee reserves the right to check students' conduct records at PSU and to use that information in considering student eligibility. Applicant must sign below to give permission to release his/her conduct record to the program for these purposes.

SIGNATURE

PSU ID#

I certify that my statements are true and complete to the best of my knowledge. I understand that my admission to or enrollment in a Portland State University Education Abroad program may be denied or revoked if any information is found to be incomplete or inaccurate. By my signature I confirm receipt and acceptance of PSU Education Abroad’s payment and refund schedule.

SIGNATURE

DATE

PRINTED NAME

OSA use only:

Current Sanctions:  □ Yes  □ No  Eff. Dates:  Notes:

Prior Sanctions:  □ Yes  □ No  Eff. Dates:  Notes:

Addl. Notes:

OSA Staff:  Sig:  Date:
Portland State University

Education Abroad
Academic Reference

(To be completed by applicant)

Name of Applicant: 

Name of Program Applying to: 

Program/Term: 

Relationship or Association with Applicant: 

Confidentiality Statement

Note to applicant: Please read and sign before giving this form to your referee.
Under Section 438, General Education Provisions Act (Public Law 50-247), you have the right to review materials submitted to the International Education Services/Study Abroad (IES/SA) in connection with your application. This law also allows you to waive this right if you so choose, with the understanding that confidential recommendations are not required in the admissions process.

(Please check one) I, the undersigned, ☐ waive ☐ do not waive the right to examine this recommendation.

Student Signature ___________________________ Printed Name ________________________

(To be completed by referee)

To the Referee:

The student named above is an applicant for the PSU sponsored study abroad program named above. To benefit from this experience, a student should be academically able, highly motivated and emotionally mature to adapt to the challenges of a different social and cultural environment. Therefore we would appreciate your thoughtful and candid appraisal of this applicant. Please mail this form to the address printed below. Thank you for your cooperation.

Name of Referee: ___________________________ Phone Number: _______________________

E-mail Address: ____________________________

Signature: ___________________________ Date: ____________

How long and in what capacity have you known this student? _______________________________________

(Continue on reverse)

Mail completed application form to:
Off Campus: Education Abroad • Portland State University • PO Box 751 • Portland, OR 97207-0751
On Campus: Mail code OIA
Tel. (503) 725-5309 • 1-800-547-8887 Ext. 5309 • Fax (503) 725-5065

PSU does not discriminate on the basis of race, color, national or ethnic origin, age, gender or sexual orientation, physical disability, political or religious belief.
In comparison with other students you have known, please rate the applicant on the following characteristics:

<table>
<thead>
<tr>
<th></th>
<th>Excellent</th>
<th>Good</th>
<th>Average</th>
<th>Poor</th>
<th>Unknown</th>
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<tbody>
<tr>
<td>Writing Ability</td>
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<tr>
<td>Ability to express himself or herself orally</td>
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<tr>
<td>Initiative</td>
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<td>Ability to cope with ambiguity</td>
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<tr>
<td>Ability to work with a group of peers</td>
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<tr>
<td>Common sense and good judgment</td>
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<td></td>
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<tr>
<td>Ability to adjust to uncomfortable and/or unusual situations</td>
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</tbody>
</table>

I ☐ would ☐ would not enjoy having the student as a member of a group for which I was responsible.

Please explain:

________________________________________________________________________
________________________________________________________________________
________________________________________________________________________

What are the student's intellectual and/or other strengths relevant to studying abroad?

________________________________________________________________________
________________________________________________________________________
________________________________________________________________________

What are the student's intellectual and/or other weaknesses that might be relevant to studying abroad?

________________________________________________________________________
________________________________________________________________________
________________________________________________________________________

Please comment on the student's motivation for study abroad. Does he or she have the ability and maturity to achieve his or her personal and/or academic goals in studying abroad?

________________________________________________________________________
________________________________________________________________________
________________________________________________________________________

Please add any other comments that would be helpful to the Admissions Committee in its decision.

________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
# Behavioral Contract for Study Abroad Participation

**Student Name:**

**Program & Country:**

**Term Abroad:**

**Date:**

**Violation:**

This behavioral contract is designed to allow your continued participation in a PSU-Sponsored study abroad program in spite of your conduct. This contract is required as a condition of your continued participation in the program and applies to the entire program period and all program activities. I hereby agree and attest that *(initial each provision):*

- My participation is allowed only on a provisional status and may be revoked at any time if I fail to follow the rules of these programs (including the rules of the site organizations and foreign universities), the PSU Student Conduct Code, and local laws and policies; and

- If I choose to drink alcohol, I will only drink in moderation and not to intoxication; and

- I agree not to use any illicit substance; and

- I agree to observe all the rules and laws that apply while I am enrolled in these programs; and

- I agree that I will be on “warning” status throughout this program, and that I may therefore face sanctions, including but not limited to expulsion from this program, for any behavioral infractions, without further warning; and

- I understand if I am expelled from this program I will not receive any refund and will be responsible for all mandatory fees and costs. I also might not receive any academic credits at Portland State University if expelled; and

- I promise to behave as a model student on this program and to engage seriously with the academic, cultural, and personal challenges of studying abroad.

**Signature of Student:**

**Date:**

**Signature of Program Director:**

**Date:**

Copies: (1) student (2) PSU Education Abroad (3) Other:
APPENDIX VI: EMERGENCY CONTACT INFORMATION

WHEN TO CONTACT EDUCATION ABROAD

Appendix VI contains a list of emergency contacts for you to use during your program. We will also give you a copy of this list before you depart. We are available to you at all times during your program. We would ask that you contact us as soon as possible if any of the following occur:

1. A student is hospitalized, even if they are released after a brief period;
2. You have had to use a behavior contract with a student;
3. If you are considering expelling a student from your program;
4. If there is a significant socio-political event in your country/region;
5. If there is a natural disaster, weather event, or catastrophic accident anywhere in your country or region during your program;
6. If a participant experiences a serious mental health situation (e.g. expressed suicidal ideation).

Emergency contact phone numbers will be provided to program faculty prior to departure.