

# **USG HANDBOOK FOR DEVELOPING AND MAINTAINING STUDY ABROAD PROGRAMS**

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# Chapter 1

## Study Abroad - An Introduction

- I. FOREWORD
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### I. FOREWORD

This handbook has been developed to provide University System of Georgia faculty and staff with practical information and advice related to the development, maintenance, and evaluation of study abroad programs. It covers all aspects of developing a program, contains resources and sample forms, and should be helpful to both the novice and experienced study abroad program director. Although the handbook focuses on island programs, many issues discussed are pertinent to all types of study abroad programs.

As of Fall 2006, there were over 400 study abroad programs (including student exchange programs) sponsored by USG institutions, and over 5,000 programs available nationwide by other colleges, universities, and study abroad organizations. If the needs of your students cannot be met by a program sponsored by your institution or another unit of the University System of Georgia, you should be prepared to provide information and advice about these other opportunities.

Sources of information about study abroad programs include:

- The *University System of Georgia Study Abroad Catalog* (<http://www.usg.edu/oie/catalog/>), which provides information about programs sponsored by University System of Georgia institutions; programs are searchable by country, field of study, term of study, and instructional language
- The Institute of International Education's *Passport* (<http://www.iiepassport.org/>), which provides a database of programs offered by U.S. institutions; programs are searchable by country, field of study and instructional language
- Peterson's (<http://www.petersons.com/stdyabrd/>), which provides a searchable database of long- and short-term study abroad options offered to U.S. students

#### Common terms used in this handbook

- *sponsoring institution* - the institution responsible for administering the program and awarding credit
- *home institution* - the institution at which a student is enrolled for the purpose of earning a degree

- *host institution* - the overseas or foreign institution which the student attends while participating on a study abroad program
- *students* - students who are participating in the study abroad program
- *faculty* - faculty/staff who teach or assist with directing the study abroad program

## **II. TYPES OF STUDY ABROAD PROGRAMS**

Generally, study programs are categorized by their type and source of sponsorship. Some of the most common types are:

- island programs
- branch campus programs
- exchange programs
- direct enrollment/matriculation programs
- hybrid programs
- field/experiential studies programs

These types of programs may be sponsored by:

- your institution or another accredited U.S. college or university
- a study abroad consortium
- a study abroad organization or a language institute that does not grant degrees
- an American university operating a campus in an overseas location
- an international degree-granting college or university

The type of program influences the nature of the educational experience and the level of the student's interaction with the host country's culture. The source of sponsorship affects the type of credit your students will earn through the program.

### **ISLAND PROGRAMS**

*Characteristics:*

- Sometimes referred to as "study center programs" because the sponsoring institution may establish and maintain a central office (or other facilities) in the foreign country, the center manages the daily operations of the program and is usually staffed with a resident director and other resident staffs who are fluent in English, can speak the language of the foreign country, are familiar with the U.S. system of higher education, and understand the expectations of U.S. students.
- The educational system of the U.S. sponsoring institution is transplanted to a foreign setting.
- The program is self-contained and under the close supervision of the sponsoring institution.
- This type of program tends to enroll U.S. students who are taught by American faculty.
- During the program, students often spend most of their time both in and out of class with other Americans.

- Courses are selected from the regular curriculum of the sponsoring institution and are usually taught in English. If language courses are offered, these are taught in the language of the host country.
- Students register for the program's classes through the sponsoring institution.
- Students pay tuition and program fees to the sponsoring institution.
- Students usually earn resident credit.
- Students from institutions other than the sponsoring institution are usually considered to be transient or non-degree-seeking students at the sponsoring institution. In addition to applying for acceptance to the study abroad program, these students must apply for admission at the sponsoring institution.
- Students from institutions other than the sponsoring institution usually earn transfer credit at their home institutions. These students need permission to transfer credit from the study abroad program.
- U.S. students are usually housed with other U.S. students in dormitories, hotels, pensions, or hostels. Housing for students and faculty is usually arranged by the program. Sometimes, U.S. students may have the option to live with a family (although this is not common in island programs).
- The duration of the program is for one or more terms.

*Advantages:*

- The sponsoring institution has control over program quality and curriculum.
- The sponsoring institution can send large numbers of students abroad at one time.
- Students from the sponsoring institution have fewer obstacles related to financial aid and can easily determine when study abroad courses satisfy degree requirements.
- The program provides the student with a great deal of structure and support.

*Disadvantages:*

- This type of program may not be sufficiently challenging for highly self-motivated and mature students or for students with advanced language skills.
- Students can become isolated from the culture of the host country. Students rarely interact with host country students or residents, except for on a superficial level, and there are limited cultural immersion opportunities.
- The sponsoring institution assumes all direct and indirect costs of operating the program and all of the liability associated with conducting a study abroad program.

## **BRANCH CAMPUS MODEL**

*Characteristics:*

- Branch campus programs are very similar to island programs in structure.
- The curriculum is usually broader than that provided by island programs disciplines.

*Advantages:*

- The branch campus model offers a wide variety of courses from a wide variety of academic disciplines.
- The program provides the student with a great deal of structure and support in a study abroad program.

*Disadvantages:*

- Students rarely interact with host country students or residents and are more isolated from the culture or the host country.
- This type of program may not be sufficiently challenging for highly self-motivated and mature students with advanced language skills.

## **RECIPROCAL EXCHANGE PROGRAMS**

*Characteristics:*

- Exchange programs involve the establishment of a formal relationship, through written agreement, between a U.S. college or university and a foreign college or university for the "trading" of an equal number of students of similar academic status (i.e., undergraduates for undergraduates) for equal periods of time.
- Usually the number of participants must be kept "in balance."
- Frequently, the terms of an exchange will limit student participation to degree-seeking students enrolled at institutions that are parties to the agreement.
- Some exchanges are open only to students enrolled in particular academic majors. This type of agreement usually exists when the exchange is between two academic departments.
- Students from the U.S. institution pay tuition and fees to their home institution at its regular rate. These funds are used by the U.S. institution to pay for the costs of enrolling the incoming student from the foreign university.
- Students from the U.S. institution register for classes at the foreign university. The foreign university issues a grade report and international transfer credit. Students from the foreign institution register for classes at the U.S. institutions and transfer credit back to the foreign institution.
- Sometimes students register at their home campus in special exchange courses in order to earn resident credit.
- Faculty at each institution provide instruction.
- Housing arrangements are usually made by the institutions that are parties to the agreement. In some cases, students may be left on their own to locate housing, dormitories, apartments, and homestays.
- Duration of the program is usually one academic year or one semester.

*Advantages:*

- Exchange programs can be very cost effective for students.
- Students are immersed in the culture of the host country and institution.



- Students whose focus is language study will benefit greatly from an exchange program where they will be enrolled in classes with host nationals and taught in the target language of the host country.
- Institutions involved in the agreement have identified mutual interests and compatible academic standards.

*Disadvantages:*

- Only a few students participate each academic year.
- Students must be able to handle course work in the language of the foreign country, so students must have adequate language skills in the host country's language.
- Exchange programs require students to be highly motivated, independent, and self-confident. This type of program may be too challenging and intimidating for many students.

## **DIRECT ENROLLMENT AT A FOREIGN INSTITUTION**

*Characteristics:*

- Students in direct-enrollment programs contact the foreign university directly. They must meet all regular admissions standards at the foreign university for international transfer students.
- Students register for classes at that institution.
- Students earn international transfer credit.
- The foreign university issues the grade report and transcript.
- Students are responsible for making all travel and living arrangements.
- Students must usually participate for one academic year. Some may decide to earn a degree from the foreign university.
- Some study abroad organizations offer students facilitated direct enrollment programs. Students apply to the organization which will then assist them in enrollment at the foreign institution.
- Students pay tuition directly to the overseas institution.

*Advantages:*

- Direct enrollment can be cost effective for students.
- Direct enrollment provides the highest level of cultural and linguistic immersion.

*Disadvantages:*

- Fewer students have the requisite language skills or maturity to navigate the challenges of direct enrollment.
- Students may not have access to adequate support mechanisms.
- Students are usually not eligible for federal financial unless the home institution allows for concurrent/joint enrollment.

## **HYBRID PROGRAMS**

### *Characteristics:*

- Hybrid programs combine the characteristics of direct enrollment in a foreign university with characteristics of island programs. For example, a U.S. institution may establish an island or study center program at or near a foreign university with which it has established a formal relationship.
- Like island programs, they offer the sponsoring institution's courses with full support services.
- Like direct enrollment programs, hybrid programs offer advanced students direct access to courses at the affiliated foreign university.
- The structure permits the sponsoring institution to simultaneously address the academic requirement of the students' language skills (i.e., beginning, intermediate, or advanced), and curricular interests.
- Students whose home institution is the sponsoring institution may earn resident credit and/or international transfer credit, depending on the policies of the home and foreign institution.

### *Advantages:*

- Hybrids may provide students with opportunities for direct contact with students from the foreign country.
- Students may be able to take courses in English and in a foreign language.
- These programs provide for greater cultural immersion than island programs.

### *Disadvantages:*

- Typically, hybrid programs cost more than exchange or direct enrollment opportunities.
- Students may have difficulty separating themselves from other U.S. students and may therefore limit opportunities for cultural immersion.

## **FIELD/EXPERIENTIAL STUDIES PROGRAM**

### *Characteristics:*

- Experiential study allows for cultural immersion by living and engaging in a particular activity in the host country. Such programs may be organized by the home institution, a foreign university, study abroad organization, or by the student himself.
- Depending on the nature of the project, the length of the program will vary from a few weeks to several months.
- These programs may be group-led, or students pursue independent projects or internship experiences.
- Field programs may or may not be affiliated with a foreign institution or study abroad organization.
- A faculty member at the student's home institution may supervise independent pursuits, or a faculty member at a foreign university or a foreign supervisor may oversee the student's work. Sometimes internship coordinators are involved as well.
- Registration may be facilitated by the home institution, a foreign university, or a study abroad organization.
- Students may earn resident or transfer credit.

- Academic tasks and expectations, including deadlines for completing projects and submitting reports, must be clearly outlined.
- Facilities, accommodations, program services, and costs will vary depending upon the structure of the program.

*Advantages:*

- Highly motivated students can develop their own opportunities abroad to meet their own academic and personal needs.
- These programs afford students a high degree of independence.

*Disadvantages:*

- Students may need to do significantly more preliminary preparation if they are not enrolled at a program or institution while in the host country.
- Students must be disciplined in order to be academically successful on these programs.

## **CONSORTIUM-SPONSORED PROGRAMS**

*Characteristics:*

- A group of institutions agree to collaborate to share resources (e.g., students, staff, funding, connections, and knowledge).
- Usually one institution in the consortium agrees to perform the program's administrative functions. Examples are the International Student Exchange Program (ISEP), the College Consortium for International Studies (CCIS), and the University System of Georgia's World Regional Council-sponsored programs.
- Students who attend institutions that belong to the consortium usually register at their home institutions for classes, earn resident credit, obtain financial aid from their home institution, and apply to the program through their home institution.
- Consortium programs may have characteristics similar to island, hybrid, or exchange programs.

*Advantages:*

- Consortia expand the number of programs available at the home institution without the home institution incurring additional costs and responsibilities of direct sponsorship.
- Students are exposed to students from other colleges and universities on these programs instead of being on programs with students from only their institutions.

*Disadvantages:*

- Consortium programs require considerable coordination, cooperation, and communication among all member institutions of the consortium.

- Institutions may belong to consortia but do not take full advantage of the program.

## **PROGRAMS SPONSORED BY STUDY ABROAD ORGANIZATIONS**

### *Characteristics:*

Educationally-affiliated study abroad organizations (ie, “third party” providers) sponsor many high-quality programs but do not grant degrees. Many of these organizations have agreements with accredited U.S. institutions or foreign universities recognized by their respective ministries of education. Depending on the agreement, the U.S. or foreign institution will provide the necessary transcripts and credit for students participating on the study abroad organization’s programs. These programs may resemble island, hybrid, exchange, or direct enrollment programs. Organizations usually provide support services for programs sponsored by U.S. colleges and universities and provide classroom space, housing, excursions, travel assistance, and other program logistics.

## **PROGRAMS SPONSORED BY AMERICAN UNIVERSITIES AND COLLEGES OVERSEAS**

### *Characteristics:*

- Programs sponsored by U.S. colleges and universities overseas may operate their own special study abroad programs in which students may enroll, or students may directly enroll at the institution and take regular university courses while abroad.
- Instruction and grading norms follow the American model, and classes may be taught in English.
- Students usually earn domestic, non-resident transfer credit.
- Students pay tuition to the U.S. university and can apply federal financial aid to the cost of the program.
- Students take classes with other Americans and international students.

### *Advantages:*

- Students who do not feel comfortable taking courses in a foreign language will have the opportunity to take courses in English in non-English speaking countries.
- Students have access to opportunities and services similar to those on a traditional U.S. campus.

### *Disadvantages:*

- Students may have difficulty integrating into the host culture.
- These programs afford limited opportunities to use foreign language skills.
- Students may encounter transfer credit difficulties at their home institutions.

## II. NATIONAL, STATE, AND CAMPUS STANDARDS FOR STUDY ABROAD

### NATIONAL STANDARDS

Since 1948, NAFSA: Association of International Educators (NAFSA) has promoted the exchange of students and scholars to and from the United States. The organization provides significant leadership in establishing and monitoring standards of good practice and in encouraging ethical conduct among individuals, institutions, and organizations involved with international education. Through its numerous international and regional programs, NAFSA provides professional education, information sharing, and training to strengthen international programs and services. The NAFSA Code of Ethics sets standards for the professional preparation and conduct of all NAFSA members. ([http://www.nafsa.org/about.sec/governance\\_leadership/ethics\\_standards/nafsa\\_s\\_code\\_of\\_ethics](http://www.nafsa.org/about.sec/governance_leadership/ethics_standards/nafsa_s_code_of_ethics)) A copy of The Code of Ethics can be found in Chapter 11 of this handbook.

The Forum on Education Abroad (Forum EA) (<http://www.forumea.org/>) has also published a working document entitled *Standards of Good Practice in Education Abroad*. A copy of the latest version of the standards can be found in Chapter 11 of this handbook.

### STATE STANDARDS

The Board of Regents of the University System of Georgia, through the System Council for International Education (SCIE), has provided an approval process for study abroad programs that are sponsored by USG institutions. All USG study abroad programs are required to be approved by the home institution. This approval should be then forwarded to the Office of International Education of the Board of Regents of the University System of Georgia. A sample format for program approvals is included in Chapter 10 of this handbook. USG program approvals on file with the University System of Georgia Office of International Education are eligible for inclusion in the *University System of Georgia Study Abroad Catalog*. (<http://www.usg.edu/oie/catalog/>)

### CAMPUS STANDARDS

Individual institutions are likely to have their own fiscal, risk management, and educational standards for study abroad programs. See the international coordinator or study abroad advisor on your campus for further details.

## Chapter 2 Planning

- I. ASSESSING NEEDS AND INTERESTS
- II. THE PROGRAM DIRECTOR'S ROLE
- III. SITE SELECTION
- IV. DETAILED PLANNING: A SAMPLE TIMELINE

### I. ASSESSING NEEDS AND INTERESTS

The first task in developing any new study abroad program is to assess its viability. Several factors are essential for a study abroad program to be successful and effective - institutional support, departmental and faculty support and interest, and student interest.

Not only is formal assessment crucial to any program's development, but it will also help the program director formulate a proposal, provide leverage for securing program approval, and indicate how to appropriately allocate specific program resources. This assessment should drive decisions concerning program type, curriculum, site selection, the targeted participant population, and other elements. A formal assessment should include:

- an examination of the goals and mission of the institution and department sponsoring the program
- the means by which a study abroad program might achieve these goals
- a survey of the interests of faculty and students
- determination of the type of study abroad program needed to fit these goals and interests

Consider the following to decide whether or not to establish a new program:

- 1) *Is there demand for additional study abroad opportunities in this location?* This may be demonstrated by determining whether there are existing programs in this location that regularly fill to capacity, by determining that there are a significant number of students attending programs in similar locations which are sponsored by campuses outside the University System of Georgia, or by monitoring the volume of specific requests by students for programs in this location.
- 2) *Is there a demand for additional study abroad programs in this academic field?* This may be demonstrated by an absence of programs designed for the major field of study, existing programs that regularly fill to capacity, by numbers of students attending non-USG programs in similar locations, or by specific requests by students for programs in this location.

- 3) *Are there any conflicts of interest that might prevent the program going forward?* For example, if your institution has an existing exchange relationship with an overseas partner institution and you do not plan to utilize this partnership, establishing a new program might create a conflict of interest.
- 4) *Is the program located in a country or area for which there is a current State Department warning?*  
Consult the State Department Consular Information Web site at [http://travel.state.gov/travel/cis\\_pa\\_tw/cis\\_pa\\_tw\\_1168.html](http://travel.state.gov/travel/cis_pa_tw/cis_pa_tw_1168.html) for an updated list of warnings and advisories.

## **II. THE PROGRAM DIRECTOR'S ROLE**

As a study abroad program director, about 80% of your time will be spent planning the program and the remaining 20% will involve implementing the program. If you have been given responsibilities for developing a program or expect to have these responsibilities, the pages that follow will assist you in learning more about your responsibilities in developing and leading a study abroad program.

### **DUTIES OF THE PROGRAM DIRECTOR**

Common duties of the study abroad program director include:

#### *Program Development*

- program marketing/publicity
- recruitment of participants
- fundraising
- identifying the purposes and educational objectives of the program
- defining criteria and developing policies to maintain academic standards
- selecting a site and making effective use of the unique physical and cultural resources of the host environment
- securing departmental support for the program
- identifying prospective faculty participants for faculty-led programs

#### *Student Services*

- providing complete and accurate information to applicants
- screening applicants to determine compatibility with the program
- developing and conducting orientations
- counseling students in resolving personal and academic problems that may arise
- evaluating participants' academic progress

#### *Managerial Duties*

- acting as a liaison between students and both the host and home institutions
- developing good working relationships with departments

- developing good relationships with foreign institutions as well as city/regional officials, business leaders, and community members in the host country
- selecting qualified, experienced staff and faculty
- supervising staff and faculty

#### *Administrative Tasks*

- preparing and distributing grade reports
- maintaining student, educational, and financial records in accordance with institutional policies and procedures
- managing facilities
- scheduling courses and events

#### *Logistical Planning*

- establishing a timeline
- conducting a site visit, where feasible
- determining deadlines for various aspects of the program such as enrollment, payment, sign-up, and cancellation

### **III. SITE SELECTION**

A study abroad site must be carefully selected based on the needs and interests of the institution and its students. In addition to issues of curriculum and target population, the selection of a program site may be influenced by the need to diversify study abroad locations and opportunities, the desire to expand study and interest in a particular region of the world, or the existence of an established relationship with an overseas institution.

Many program locations are secured through cooperative ventures with other institutions or organizations. Program directors often establish a relationship with an institution in the host country which will rent classroom and dormitory space for a study abroad program. In some cases, a study abroad organization or agency will be contracted for services and/or facilities.

#### **AFFORDABILITY, STABILITY, AND CONVENIENCE OF A SITE**

Affordability, convenience, and stability of a site are top concerns when developing a study abroad program. The following will help you determine if any of these factors will enhance or hinder program development at a particular site.

##### *1) WILL THE SITE BE AFFORDABLE?*

The site's cost of living and the cost of travel to the area will be carefully scrutinized by the institution, students, and their parents. This will be important since fixed program costs may be higher in some locations than in others. Affordability will be of utmost importance in recruitment as students and their parents often base study abroad



program selection decisions on economic factors. Thus, program directors must carefully examine ways to make the program economical for all parties involved.

#### *2) WILL THE SITE BE CONVENIENT?*

Students are often interested in traveling and seeing as much as possible during a study abroad experience. Although site-seeing is not necessarily a primary focus of study abroad programs, realistically, students will want to explore surrounding areas during their free time. Location in relation to other places is also important for program directors who wish to plan excursions. Methods of transportation in both the immediate area and in the surrounding region should be considered when choosing a site.

#### *3) WILL THE SITE HOST A MAJOR INTERNATIONAL EVENT?*

While the limelight of hosting the Olympics or the World Cup Soccer tournament will make a site more noticeable, conducting a study abroad program during such an event has many drawbacks. The most pressing challenge will be the availability of housing, followed by an increase in the cost of living and an increase in travel costs to the destination. A program in its first year would be well advised to avoid such a site (unless the purpose of the program is to study the event itself). If the program is scheduled to occur during the event, the program director should also be prepared for the challenge of dealing with participants who are more interested in the event than in the academic program.

#### *4) ARE THERE MAJOR CONCERNS RELATED TO STUDENTS' HEALTH AND SAFETY AT THIS SITE?*

Although the developmental changes accompanying study abroad may at times be uncomfortable, students' health and safety should never be compromised. Potential study abroad sites should be carefully evaluated for health risks, political instability, and/or civil unrest.

A different environment may challenge students' health in a variety of ways. Intestinal viruses, reactions to insects, altitude adjustments, and a multitude of other possible physical ailments are common when traveling and living abroad. Unfortunately, these conditions can be very serious, so precautions must be taken when traveling to a site with known health risks. The political and civil stability of a site should also be carefully considered. If a program will take place in a country with known political unrest, historic racial or religious antagonism, or known physical challenges, the program director and the student participants must be well informed and should be prepared to take swift action in the event of an emergency or crisis. Please refer to Chapter 5 on risk management for additional information.

#### *5) IS THE REGION ECONOMICALLY STABLE?*

Some regions considered to be politically stable may not always be economically stable. The economics of study abroad will always be a challenge - fluctuations in currency exchanges can be a hindrance and a blessing. These fluctuations will never guarantee a favorable exchange rate; therefore, it is sometimes advisable to make arrangements with a bank to buy currency at a frozen exchange rate. Although the selection of a site with relatively

stable economic conversion rates may be preferable for a first-time director, economic stability can never be guaranteed.

6) *CAN I WORK WITH AN ESTABLISHED PROGRAM ON A SITE?*

It may be possible and prudent to work with an established program when offering a study abroad program for the first time. If your own institution or another USG institution has a program at the prospective site, consider whether the development of an additional program is appropriate. Working with an established program can have many benefits, including the speed with which the program director will be able to establish and promote their program as well as the substantial savings in start-up costs for the program.

#### **IV. DETAILED PLANNING: A SAMPLE TIMELINE**

Depending on the complexity of the program, program location(s), purpose, and other factors, more or less time may be necessary for planning your particular program. Attention to detail and consistent follow-through are the hallmarks of good study abroad program development. Following is a sample timeline for preparation of a successful study abroad program.

# **Chapter 3**

## **Program Administration and Finances**

- I. ADMINISTRATIVE STRUCTURES OF STUDY ABROAD PROGRAMS
- II. ACADEMIC ISSUES
- III. STUDENT FINANCIAL AID
- IV. STUDY ABROAD SCHOLARSHIPS
- V. BUDGETS

### **I. ADMINISTRATIVE STRUCTURES OF STUDY ABROAD PROGRAMS**

Currently, there are five different models used for the academic administration of study abroad programs within the USG. Your institution may use different types of administrative structures for different programs or may use all five models in various circumstances.

One of three models may apply when your institution sponsors and administers its own study abroad programs:

- the resident model
- the transient model
- the full-transfer model

One of two models may apply when your institution is working with other USG institutions in a consortium or cross-listing agreement:

- the consortium instruction model
- the cross-listing model

#### **THE RESIDENT MODEL**

*Features:*

- Your institution sponsors and administers its own program.
- Your students enroll for classes at your institution and earn resident credit.
- Program participation is typically limited to students enrolled at the sponsoring institution only.
- Student participants from your own institution will obtain financial aid through your institution's office of student financial aid and follows your institution's policies on financial aid.
- Students pay the program fee and tuition to your institution using an established administrative process.

*Benefits:*

- There are few barriers for students to overcome when registering or applying for financial aid.
- Your institution will retain the full benefit of the full-time-equivalency (FTE) factor.

*Limitations:*

- Your institution assumes all administrative responsibilities for operating the program - an investment of personnel and financial resources.
- The pool of applicants for this type of program will be reduced if participation is limited to sponsoring institutions' students only.

## **THE TRANSIENT MODEL**

*Features:*

- Students from other institutions who participate in a study abroad program sponsored by your institution will probably be classified as transient students at your institution. Some colleges refer to transient students as *guest*, *visiting*, or *non-degree* students. The transient classification indicates that these students do not plan to stay at your institution to pursue a degree.
- Transient students register for classes at the sponsoring institution and transfer credit from the sponsoring institution to their home institutions.
- Transient students pay all tuition and program fees directly to the sponsoring institution.
- Transient study abroad students typically receive student financial aid from their home institution.

*Benefits:*

- Your institution retains the FTE.
- When enrolling participants from another campus, the transient model is a traditional model and most registrars are familiar with it.

*Limitations:*

- Some students may need to obtain resident credit at their home institutions to fulfill degree residency requirements.
- Students may have difficulty obtaining financial aid.

## **THE FULL-TRANSFER MODEL**

*Features:*

- On rare occasions, it may be necessary for a visiting student to enroll at your institution as a full-transfer student rather than a transient.
- Although the student has no genuine intention of pursuing a degree at your institution, it may be necessary for the student to transfer to your institution in order to receive financial aid for which the student is legitimately eligible. This situation arises when your institution's financial aid office will not sign financial

aid consortium agreements, when the student's home institution will not enter into financial aid consortium agreements, or when the student's home institution employs an overly conservative interpretation of financial aid regulations related to study abroad.

- Full-transfer students obtain student financial aid through your institution and pay all tuition and program fees to your school. They also register at your institution.

*Benefits:*

- Your institution will retain the FTE, and students will transfer credit back to their home institutions.

*Limitations:*

- Students must transfer credit back to their home institution.
- Students encounter more barriers, and the administrative hassles are significant.

## **CONSORTIUM INSTRUCTION MODEL**

*Features:*

- USG institutions enter into consortium agreements for study abroad programs.
- Faculty from all member institutions of the consortium are selected to teach on the program and are responsible for actively recruiting students.
- Faculty salary for the period abroad is provided by the faculty members' home institution(s).
- One institution participating in the consortium volunteers to act as lead institution and administer the program.
- The lead institution coordinates the logistics of the program and collects program fees from all participants.
- Students whose home institutions are full members of the consortium will register for classes at their home institutions and will earn resident credit from their home institutions.
- Students from consortium-member institutions obtain financial aid from their home institutions, pay tuition at their home institutions, and pay the study abroad program fees to the administering institution.
- Institutions that participate in the consortium retain the tuition and FTE. Tuition is not transferred to the institution that is providing administrative services. This is sometimes referred to as the "tuition-stays-at-home" consortium model.
- Students whose home institutions do not belong to the consortium are processed as transient students at the lead institution. These students pay tuition and program fees to the lead institution.
- The lead institution provides registration and transcripts for these students.

*Benefits:*

- Consortium member institutions retain the tuition and the FTE and their students earn resident credit and obtain financial aid through their home institution.

*Limitations:*

- Faculty must make arrangements with their home institution for payment of their salary.

Examples of this model are the programs sponsored by the European Council. With these programs, all USG institutions that belong to the European Council receive the full benefit of sharing resources.

## **THE CROSS-LISTING MODEL**

### *Features:*

- Institutions may participate if faculty can create courses equivalent to those that are offered by participating study abroad programs.
- In order for a study abroad program to be cross-listed, the institution must have a course equivalent for every course offered on the program. If this cannot be accomplished, the program cannot be cross-listed at that institution.
- Students enrolled at a participating institution register for the cross-listed study abroad program's classes at their home institution.
- Students obtain student financial aid from the home institution, earn resident credit, and pay tuition to the home institution.
- The home institution forwards the tuition money to the program director of the sponsoring institution. (This may be referred to as the “tuition-follows-instruction” model.)
- Study abroad programs opt to participate if the cross-listing model is to their benefit.
- Students participating in study abroad programs not cross-listed at their home institution must be enrolled at the sponsoring institution as transient students.
- The home institution retains the FTE. Students pay study abroad program fees directly to the sponsoring institution.
- At the conclusion of the program, the sponsoring institution’s program director forwards the students’ grades to their respective home institutions.

### *Benefits:*

- This model facilitates the movement of USG students across institutional boundaries.
- This type of structure broadens the pool of student participants.
- This structure removes some of the common impediments associated with study abroad (e.g., administration of financial aid, difficulty in transferring credit, residency requirements).

### *Limitations:*

- Differing rates of tuition charged by USG institutions can create tuition income discrepancies.
- This additional structure imposes administrative responsibilities for program directors and institutions.
- The number of institutions who participate is limited since not all institutions are able to provide equivalents for all courses.

## II. ACADEMIC ISSUES

The academic worth of a study abroad program, as perceived by administrators, faculty, and students, is determined by a well-designed curriculum that matches the purposes of the program and the interests of the students. Student recruitment, retention, and satisfaction will be affected by the type of credit offered by your program, the ease of the registration and credit approval processes, the grading scales/systems, and the timeline for reporting grades.

### **CONTACT AND CREDIT HOUR REQUIREMENTS**

The heart of any study abroad program is academic integrity. No matter what time of year a study abroad program is offered, study abroad programs should be academically challenging both in the classroom and in the international environment. Determining the appropriate number of credit hours is part of maintaining academic credibility.

Considerations in allocating credit hours:

- The program should include roughly 80% of the contact hours required for campus credit. This assumes that a great deal of learning occurs outside of the classroom and that excursions are more than sight-seeing trips.
- Determine the realistic amount of time the student can be devoted to both in-class instruction and out-of-class homework, activities and study.
- Devise the program's schedule so that hours of instruction include lectures before, during, and after the overseas portion of the program.
- The duration of your program and the required number of hours of in-class instruction per day will help determine the maximum and minimum number of credits students can earn through the program.
- Students will have many diversions on their study abroad program. It is advisable to tie course grades with class attendance, especially for short programs where classroom instruction is concentrated.

### **CURRICULUM**

The curriculum is the core of any study abroad program, and institutional needs should guide course design and content.

Considerations for curriculum development:

- The program site should enhance the courses taught and should provide environmental and cultural elements that significantly enhance teaching and learning.
- The curriculum of the program should reflect the international mission of the institution, the purposes of the program, and the target population's interests and needs.
- A narrow curriculum may be appropriate in some circumstances, such as in programs designed to focus on a very specific discipline or topic.
- If the curriculum is too narrow in scope, or seems esoteric, recruiting sufficient numbers of students to the program may be difficult.
- Study abroad programs offering core classes will likely appeal to freshmen and sophomores, while juniors and seniors will be more interested in programs offering courses that will satisfy requirements for their

major.

- Matching faculty who are available and willing to teach appropriate study abroad courses will take time and effort on the part of the program director, the department, and the institution

## **CREDIT TRANSFER PROCESS**

Before students can decide whether to participate in a study abroad program, they will need to know what type of credit will be earned overseas, whether credit will transfer, the amount of credit that will transfer, and how the credit will be applied to their degree program. Most institutions have developed standardized credit transfer approval processes for assisting students in this regard. Contact your admissions office, registrar's office, and chief academic officer to determine if students from your institution participating in a program through another institution need to undertake a credit transfer approval process. If there is a process they must follow, determine what it is. If it is a cumbersome process, think of ways to simplify it. If there is no credit transfer approval process, work with officials at your institution to develop one. Appropriate records should be maintained by students and the institution.

## **TYPES OF CREDIT**

There are three types of credit:

- resident credit
- domestic transfer credit
- international transfer credit

### *RESIDENT CREDIT*

USG students who participate in World Regional Council study abroad programs can often receive credit from their home institutions. If your college or university is sponsoring a study abroad program and the overseas classes are actually home-campus courses, your institution's participating students may earn resident credit. When students earn resident credit, grades and credits are posted to the student's home institution transcript. Grades earned as resident credit are incorporated into the institutional GPA and the overall GPA. With resident credit, the way in which study abroad courses apply to students' degree programs is more apparent to students and their academic advisors.

### *DOMESTIC TRANSFER CREDIT*

The home institution may award domestic transfer credit to students participating in the following types of study abroad programs: consortium programs; programs administered by other U.S. educational institutions; or programs administered by U.S. universities or colleges overseas. Credit and grades earned will be posted to a transcript from the sponsoring U.S. university and will be evaluated by the home institution. Transferred grades may be incorporated into the overall GPA, and the transferred course credit may be used to satisfy requirements for the student's degree program.



### *INTERNATIONAL TRANSFER CREDIT*

Students who participate in an overseas exchange program or who directly enroll in a foreign university will usually earn international transfer credit. However, if your institution permits, students who attend exchange programs sponsored by your institution may earn resident credit. In order for international transfer credit to be recognized by a U.S. institution, the overseas institution must be recognized by the country's ministry of education. The credit and grades earned are posted to a transcript from the overseas institution. Those grades and credits will be evaluated for transfer by the student's home campus. Some institutions may award resident credit for their own exchange programs and calculate the foreign grades into the overall GPA. If not, the home institution will instead use a pass/fail grading system. In either case, credit hours may be counted towards the student's degree program requirements. Should course work need to be evaluated upon receipt of transcripts, students earning domestic or international transfer credit should be advised to retain all overseas work including syllabi, exams, and papers. Remember that few international universities use an American system of grading. You may need to work with a credentials evaluator to correctly interpret the foreign transcript. Check with your admissions and/or registrar's office to find out what type of credit your institution awards for overseas education.

### **REGISTRATION**

Keep in mind the way participants will be registered in their study abroad courses. Institutions do this in a variety of ways. Some institutions use existing campus course numbers to serve as the registration mechanism for overseas education and have a special designation added for study abroad programs. For example, HIST2150 may be HIST2150SA if the course is taught on a study abroad program. Other institutions use special study abroad course numbers to register participants. Ask your registrar how this is handled on your campus.

A related issue is pre-registration for student participants for the term following their study abroad program. You may want to suggest to students that they have a friend or family member pre-register for them or suggest they explore online or e-mail registration. Ask your registrar how students can obtain the necessary registration materials.

### **GRADING SCALES/EDUCATIONAL SYSTEMS**

If your program is an island program, or if you are using the branch-campus model, you may use the same grading system that is employed at your home campus. However, if you are working with an exchange program or hybrid program, your students' grades may be determined by foreign institutions and a foreign grading scale or system. Some U.S. colleges and universities will translate foreign grades into U.S. grades and then include these converted grades in the calculation of the overall GPA. Others avoid grade conversions by opting to use a pass/fail grading system, in which case grades will not be calculated into the home campus GPA or the overall GPA. Contact your registrar or admissions office for information about policies which apply at your institution.

### **GRADE REPORTING TIMELINE**

A delay in reporting study abroad grades and credit hours to the appropriate admissions or registrar's office can hinder a student's ability to receive appropriate financial aid awards. In some cases, this delay may even impact a student's graduation date. If possible, when reporting grades, it is ideal to follow the same grade reporting timeline as on the home campus.

Institutions with which you have an exchange or affiliate program agreement may have their own grade reporting timeline. In this case, your university should have special arrangements in place for those exchange program participants. For example, if a student's financial aid awards are held until grades from an overseas university are received, having the host institution fax a grade summary report to the admissions office, registrar, and/or financial aid office may allow home administrators to release the aid. Students should know in advance that transcripts may be delayed and should understand the consequences of such possibilities. You will also need to determine how the overseas classes will be transcribed on the home campus transcript. Will the registrar's office denote that the student participated in study abroad? This can be an important matter for students needing documentation of an international experience in order to enhance their chances of obtaining overseas employment or being accepted into a graduate degree program.

### **III. STUDENT FINANCIAL AID**

Generally, students may use their student financial aid for study abroad program course work. Institutions may not deny federal financial aid to eligible students simply because they are participating in study abroad programs (if the programs are approved by the student's home institution). Inform current and prospective students that if they enroll in approved study abroad programs, they can use their federal aid for such purposes. The amount of aid students receive may depend on a number of factors such as:

- previous income
- earnings history
- the type of aid program they will use
- federal funding formulas
- the number of hours of enrollment
- the cost of the study abroad program

There are four primary sources of aid for students: federal, state, institutional, and private. Students commonly receive aid from more than one source; these funds are bundled together and form the student's financial aid package. The sum total of the package is usually fixed for the award year unless the student's financial circumstances change. Thus, during the course of the year, an increase in one source of funds (e.g., private scholarships), may lead to a decrease in another source of funds (e.g., funds from federal programs), depending on various regulations.

#### **FEDERAL, STATE, AND INSTITUTIONAL SOURCES OF AID**

Title IV of the Higher Education Act of 1965, which is reauthorized every five years by Congress, makes it legal for

federal student financial aid money to be used for study abroad if the credit earned is approved by the home institution. Examples of federal student financial aid programs are Federal Direct Subsidized and Unsubsidized Loans, Perkins Loan, Federal Direct PLUS, Student Incentive Grant (SIG), the Federal Pell Grant, and the Federal Work-Study program. Institutions cannot legally prohibit a student from using federal financial aid for study abroad.

Students who receive aid through state programs, such as Georgia's HOPE Scholarship, may use this aid for study abroad programs if the credit earned while abroad is approved by the home institution. HOPE scholarship levels can often be adjusted to cover additional costs; students should consult their financial aid offices early in the application process to determine if this adjustment is possible. Students may also utilize special, institutionally funded or privately funded aid programs and scholarships. Although state aid programs are likely to be patterned after federal law and regulations, institutional aid programs may be more restrictive as to duration, location, type of recipient, and manner in which the money may be used. Therefore, students may encounter some restrictions related to using institutional and private aid for study abroad.

University System of Georgia students may also receive state financial aid for study abroad through the Board of Regents **ST**udents **A**broad with **R**egents' **S**upport (STARS) Program. These awards are funded jointly by the Board of Regents and each of the 35 colleges and universities in the University System of Georgia, though program availability varies by institution. Eligibility is limited to students enrolled in associate's and bachelor's degree programs at USG institutions. There are 3 main STARS programs for which students may be eligible:

- 1) **Regents Work and Study Abroad Stipends**, which are on-campus student employment positions designated for students planning to study abroad
- 2) **Regents Global Ambassador Travel Grants**, in which grant recipients will participate in service activities in the host community of their study abroad location to promote Georgia's international education policy through public engagements with schools, civic organizations, local governments, businesses, and other groups
- 3) **Regents Study Abroad Assistantships**, where on-site student assistants help program directors with administration, residence life, course research, co-curricular events, and other activities

Finally, some USG institutions offer their own sources of financial aid. Check with your campus study abroad advisor or financial aid office to determine if loans or other aid earmarked for study abroad programs are available to students at your institution.

## **ELIGIBILITY AND DISBURSEMENT**

Students attending a study abroad program sponsored by their home campus apply for and obtain student financial aid through their home campus. Students attending study abroad programs sponsored by other institutions usually apply for and obtain student financial aid through their home institutions. Occasionally students may be classified as full-transfer students at the institution sponsoring the study abroad program; in such cases these students' eligibility verification and awards are processed through the sponsoring institution.

Students must apply for student financial aid in a timely fashion with the appropriate student financial aid office. Financial aid staff will determine whether the student meets eligibility requirements for student financial aid. The bursar's office or student loans office may be responsible for the disbursement of funds. As a program director or study abroad advisor, it will be important for you to understand which office on your campus determines eligibility for student financial aid, which office disburses the money to the students, and how it is distributed.

Depending on the preferred practices at your campus, students may need to supply the student financial aid office with a copy of their program acceptance letter. An acceptance letter should contain written documentation indicating that transfer credits earned through a study abroad program have been pre-approved for transfer by the home institution and the student's academic advisor. In some cases, it may be necessary to provide the financial aid office with a copy of the student financial aid consortium agreement. A student financial aid consortium agreement is used when the student is a transient at the institution sponsoring the study abroad program. It clarifies for the student and for the two student financial aid offices (both the home institution and the sponsoring institution's offices) which office will be responsible for determining eligibility and disbursing aid. It also prevents the student from simultaneously receiving aid from two institutions, which is a violation of student financial aid regulations.

Therefore, as a program director, you may be required to provide documentation to your campus study abroad advisor, the student financial aid office, and other offices regarding the names, gender, student identification numbers, hours of enrollment, and enrollment status of program participants. If you need to provide such documentation to officials outside of your campus, be sure to obtain a written release from the student before you provide private such information to a third party. You have a responsibility to comply with the Family Education Rights and Privacy Act (FERPA).

Federal laws and regulations determine how, when, and how often student financial aid money is disbursed. However, policies may vary among USG institutions. Many institutions disburse aid to students approximately 10 days before the beginning of each regular academic term. Students may not receive all of their money for a given semester at the beginning of that term. Often, half of the money is disbursed to students at the beginning of the term, and if the students are still enrolled at midterm, the remaining half is distributed. Therefore, if your program departs one month before the semester begins, do not expect your institution to disburse aid according to your departure schedule. Under these circumstances, the student pays program fees and financial aid is a reimbursement to the student.

Sometimes the delayed disbursement of aid and payment deadlines for study abroad programs create financial hardships for students, and occasionally students ask program directors to defer payment of tuition and program fees until they receive their aid. In such cases, you should ask students to provide you with a copy of their student financial aid award letter that is applicable to the period they will be abroad. This will provide documentation of the amount of aid that the student is likely to receive (provided the student continues to meet eligibility requirements at the time of disbursement). Then, you can use this information to make an informed decision regarding payment deferral.

#### *CREDIT APPROVED BY THE HOME INSTITUTION*

Federal regulations assume that the students' home institutions have policies and practices related to the approval of resident study abroad credit and non-resident study abroad transfer credit. This approval should be secured before the student departs the home campus. The definition of "approval" may differ from campus to campus and from department to department. Approval may be granted by the study abroad advisor, the student's academic advisor, department head, or dean.

As long as the student is making satisfactory progress towards degree completion and is meeting other university and financial aid requirements, the credit which is transferred may fulfill core credit requirements, elective credit requirements, or even be considered as additional credit in the student's degree program. The transferred credit does not necessarily have to fulfill courses required in the major area of study.

#### *APPROVAL OF RESIDENT CREDIT*

Generally, approval of resident credit from an institution's own study abroad program is not a problem and is virtually automatic since the student is registered at the home campus. The home institution's faculty have control over the content and rigor of the curriculum and are therefore assured that the program and course work meet institutional academic standards. The home institution's student financial aid officials can easily verify that the student is using the aid for educational purposes. They can verify the number of credits the student is taking so they can be assured that they are awarding and disbursing the proper amount of aid to the student. They can also verify that the student is maintaining enrollment and is therefore in compliance with the requirement of maintaining "satisfactory progress" toward degree completion. Because students may receive two disbursements of aid during a semester (e.g., half of their semester award at the beginning of the term and the remaining half at midterm), verifying ongoing enrollment is an important issue for financial aid officers.

#### *APPROVAL OF NON-RESIDENT TRANSFER CREDIT*

Approval of non-resident transfer credit from a program sponsored by another institution or organization is not automatic but can be successfully managed so that academic and financial aid requirements are satisfied. Institutions in Georgia that have successfully implemented approval processes for transfer credit usually employ a set of similar procedures. Most institutions create a study abroad credit approval form or a pre-approval of study abroad credit form for students to complete prior to departure. The form asks students to attach information about the program such as the duration of the program and the courses and the number of credits they plan to take. The form assists students in obtaining written assurances from academic advisors and other appropriate officials on the campus that the student's home campus will approve the credit for transfer. The form also provides students with some indication as to how the courses they plan to take may apply toward their degree. Completion of this form confirms for financial aid officials that the study abroad credit has been approved for transfer by the home institution. Institutions often have students complete and return a verification of enrollment abroad form once students are abroad. This

usually provides sufficient documentation for financial aid officials that the student is actually enrolled abroad and is maintaining “satisfactory progress.” These processes may be coordinated by a study abroad office on campus or by some other appropriate authority.

### **AWARD AMOUNTS**

The amount of aid students can receive depends on several factors. These factors include the amount of aid students have already received during the award year, the number of credits for which they plan to enroll, the kind of aid for which they are qualified, compliance with other financial aid regulations, and the cost of the study abroad program. Students may receive an award based on the estimated cost of attending their home institutions or based on the estimated cost of attending the study abroad program (assuming this cost is higher). As permitted by federal laws and regulations, student financial aid officials have discretion in such matters.

If you are working with a financial aid office that will calculate awards based on the higher cost of attending the study abroad program, the financial aid officer will need a complete student budget that includes detailed information on all expenses related to participation in the study abroad program. Program directors who fail to supply this information to students may negatively affect their recruiting efforts, as students will not be able to adjust their award packages in compliance with financial aid regulations.

### **COST EFFECTIVENESS**

Program directors need to keep in mind the financial aid issues mentioned above when establishing the costs of their programs in preparing program budgets. Although you must charge a sufficient rate to manage the program effectively, if the cost of your program is significantly higher than the cost to attend the student's home institution, prospective students will likely look elsewhere, incur additional debt, or decide not to go abroad. Keep in mind that maintaining low program costs is just as important as establishing student scholarships.

## **IV. STUDY ABROAD SCHOLARSHIPS**

In addition to loans and financial aid, many study abroad scholarships are also available from various government agencies and private foundations and organizations. Although many of these scholarships do not tend to provide assistance for short-term or summer study, they do offer significant opportunities for students who wish to study for a semester or an academic year. Students must often apply for these scholarships a year or more in advance.

### **ESTABLISHING CAMPUS STUDY ABROAD SCHOLARSHIPS**

Despite the steady rise in the number of American students who study abroad each year, there is still a need to make overseas education a viable option for all of those who wish to study abroad. One way to do this is to provide financial support to potential study abroad participants in the form of scholarships. In an effort to defray the costs of studying abroad, a growing number of study abroad programs have developed their own scholarship funds. If you are considering this, contact the chief fiscal officer on your campus so that you can be assured you are complying with

institutional and USG fiscal policies and procedures. Program directors need to be aware of and tap into both campus and community resources for support, guidance, and possible funding sources. This section will give you ideas about the resources on your campus and the different types of funding sources.

### *CAMPUS RESOURCES*

The first step in planning to establish a scholarship fund is to gather information and support from various faculty and administrators on campus. The study abroad office is a good starting point. Staff can tell you about the general climate and level of support for study abroad on your campus. Study abroad advisors can help you identify key administrators and faculty who support study abroad. They can also advise you on the study abroad scholarships that are currently available.

For additional help, contact your development office. The development office on your campus can identify the best possible funding sources and assist you in coordinating your fundraising efforts. Most USG institutions require that all fund-raising efforts be approved by and coordinated through their development offices.

In addition to working with development staff, you will also want to check with colleagues and fellow program directors for leads on companies, foundations, and agencies that have supported study abroad in the past. They can share with you their experiences in similar endeavors and may be able to give you ideas and suggestions.

You might also want to talk with your institution's chief business officer about possibilities of utilizing program revenue surpluses for program and student support.

### *FUNDING SOURCES*

Study abroad returnees are a good source for generating scholarship funds. The development and alumni offices on your campus are valuable resources for contacting potential donors. These offices can advise you on fundraising proposals, assist with targeting previous program participants, and provide access to mailing labels. The alumni office may provide additional support by giving you editorial and advertising space in alumni newsletters, Web sites, or magazines.

Private and public companies, foundations, organizations and agencies will sometimes provide grants for study abroad programs. The money is often used to decrease the cost of the program for all participants, or it may be used to establish a scholarship fund for students who have demonstrated financial need and/or academic merit.

## V. BUDGETS

The faculty member or study abroad administrator in charge of an island program will most likely assume the role of financial administrator and as such will have the following responsibilities:

- Prepare a budget which outlines estimated income and expenses for the program.
- Prepare a cost summary for students that itemizes their program-related expenses.
- Prepare a payment schedule for students to ensure that all program fees and tuition have been collected

before the students depart the U.S. If program fees and tuition are the only sources of income, the payment schedule should facilitate your ability to make timely deposits and payments to vendors/suppliers.

- Develop written cancellation refund policies for the following: (1) student cancellation (2) program cancellation (3) cancellation of certain program elements (e.g., excursions or classes). Refund policies should address issues of illness, financial hardship, academic ineligibility, and host country instability. The more explicit the refund policy is, the fewer misunderstandings will occur.
- Develop written policies related to deposits, defaults, and damages. For example, many institutions will prevent a student from registering or receiving transcripts for non-payment of institutional debts. Programs frequently establish similar policies to encourage timely payment of program and tuition fees or payments for damages a student might make to a dormitory room.
- Develop appropriate and realistic installment plans to pay vendors for services such as those related to leasing classroom/office space, travel, lodging, and meals. If program fees and tuition are the only sources of income for your program, negotiate with vendors for payment deadlines that coincide with expected income flow from students.
- Manage accounts payable and accounts receivable.
- Manage funds while abroad, including bank accounts in the foreign country. Establishing foreign bank accounts is not recommended for most short-term programs. Discuss financial procedures and options with your institution's chief business officer.
- Maintain appropriate fiscal records involving currency conversion transactions (e.g., rate, amount, and commissions or bank charges).
- Manage petty cash fund expenditures in compliance with institutional and Board of Regents fiscal policies. Be sure to keep all receipts and certify expenditures without receipts.
- Report travel expenses in compliance with institutional and BOR travel procedures for employees.
- Manage and supervise payroll, benefits, and related taxes for staff and faculty employed by the program.
- Determine the curricular emphasis of the program, and obtain estimates of some of the major program-related expenses (such as housing, meals, excursions, instruction, etc.). There are several types of budgets, but most study abroad programs in the University System of Georgia use a program budget.

#### *STEP I: DETERMINE EXPENSES*

The first step in preparing a program budget is to determine all anticipated expenses. When establishing a budget for a new program, keep in mind that new programs may be more expensive to operate the first year. Reasons vary, but minimal enrollment, miscalculations made in negotiations for services, and publicity and advertising costs may make a new program more expensive than one which has operated for several years. Additionally, the program may need to develop a reserve fund to cover advance payments for facilities for the subsequent year. Listed below are some common program expenses. Not all of these expenses will relate to your program, and you may have expenses that are not listed here.

- travel expenses to evaluate the site



- communications (telephone, fax, wire, e-mail, courier services, mail, shipping); installation and usage costs
- advertising, publicity, graphic design services, Web page design and implementation costs
- rental (or purchase) of buildings, rooms, and equipment for instruction and administration
- rental (or purchase) of facilities to house students, faculty, and staff
- meals (on-site and during excursions)
- excursions and class-related field trips
- student accident and sickness insurance
- trip cancellation insurance
- scholarships for participants
- salaries/stipends/honoraria for faculty who provide instruction
- salary/stipend for program director and other staff, if applicable
- benefits for faculty, staff, and program director
- travel for faculty and staff
- taxes, U.S. and foreign (payroll and property, if applicable)
- emergency/contingency fund - \$100 per participant is recommended

#### *STEP II: DETERMINE SOURCES OF INCOME*

The second step is to determine sources of income for your program. Revenue for study abroad programs may be generated from several sources: the program fee, tuition (which may or many not be included in the program fee), grants, private donors, and institutional funds. Most study abroad programs sponsored by institutions in the USG generate the bulk of their income from program fees, tuition, and institutional funds.

#### *STEP III: ESTABLISH THE PROGRAM FEE*

The third step is to determine a reasonable and competitive program fee to cover your expenses, taking into account other sources of income available and an understanding of other costs students will incur as a result of participating in the program. This can be a difficult task for several reasons. Determining a fee hinges on student perspectives about study abroad and its affordability as well as your institution's educational and managerial philosophies about study abroad. Determining the final program cost requires you to have a basic understanding of the BOR fiscal rules and regulations regarding the collection and expenditure of funds from various sources. For example, in most cases, tuition revenue in the University System of Georgia may be expended only for faculty salaries, fringe benefits, travel for faculty, and other normal instructional costs. Funds from the program fee (not including tuition) can be spent for all other program costs, including instructional costs not covered by revenue from tuition. Consult the business officer on your campus for more details about USG and institutional fiscal policies and their effect on your budget.

By using the program fee as their guide, students often compare programs, hoping to get the best value for their money. Thus, the program fee must be competitive with similar programs and with programs that recruit from the same population of students. Most programs sponsored by institutions of the University System of Georgia operate "self-sustaining" programs. In practice this means that the institution does not subsidize the program; the full cost of

operating the study abroad program is borne by the participants. Thus, students are charged a program fee (including tuition) that is sufficient to cover all program expenses. Assuming that you have a simple budget and have no other sources of income except the program fee (including tuition), you can determine a good estimate of the program fee by adding all of the program's expenses, then dividing the sum by the number of paying participants required to break even. If you recruit more participants than the number required to break even, the program makes money. If you recruit too few students, the program may be canceled, or it might operate in arrears, causing the sponsoring department or institution to cover the amount of the shortfall by the end of the fiscal year.

#### *STEP IV. DETERMINE EXPENSES NOT COVERED BY THE PROGRAM FEE*

The program fee may not reflect all of the costs for participants. Expenses such as international airfare, in-country transportation, laundry services, and passport and visa fees are often omitted from the program fee but are necessary expenses for all participants. Although program directors may elect to exclude such fees from the program fee, they should be mindful that students (and their parents) will ask about these costs, especially if they have no previous experience traveling abroad. It is a good idea to maintain written estimates of such expenses so that students can make realistic decisions as to the program's actual affordability in light of their personal financial circumstances. Furthermore, students will need this budget information for their financial aid offices so that the actual cost of living in the foreign country can be determined.

Some typical study abroad costs for students are listed below. The extent to which you include these expenses in your program fee is a matter of judgment and should be guided by ethical principles as outlined by NAFSA.

- application fees
- passport fees, visa fees (entry and exit), airport taxes, passport photos
- tuition
- meals at the main location and during excursions - the number of meals per day, number of days per week, and the number of weeks meal service is provided by the program
- deposits, both refundable and non-refundable, for damages, use of equipment, etc.
- excursions and field trips
- entrance fees to museums and other sites
- laundry service
- ground transportation (bus, train, trolley, taxi, boat, subway)
- international airfare
- airline transfer fees
- orientation program fees
- costs associated with computer use, phone use, Internet access and, e-mail,
- library or student facility fees
- insurance (major medical, accidental death and dismemberment, repatriation of remains, trip cancellation,

emergency evacuation, travel insurance, and renter's insurance)

- books and supplies
- medical exams, vaccinations, prescriptions, and other medical expenses for the duration of the program
- personal expenses such as school supplies and materials, gifts, souvenirs, currency conversion commissions, film, stamps, clothing, sundries, travel gadgets, fees for changing airline reservations, travel independent of the program (before/during/after the program), entertainment

*STEP V. ESTABLISH APPROPRIATE ACCOUNTS FOR THE PROGRAM*

Once you have established a first draft of your program budget, consult the business officer on your campus to set up the necessary accounts for your program. Review the budget and ask your business officer to explain the fiscal management practices that you will be expected to follow. Although practices and terminology may vary from campus to campus, study abroad programs sponsored by units of the University System of Georgia usually use these types of accounts: revenue accounts, expenditure accounts, agency accounts, auxiliary accounts, and petty cash funds. Each type of account or fund has its own operating procedures and guidelines. For example, funds from program fees may be managed by using an agency account. Tuition may be managed by another account. According to BOR policy, funds from tuition held in a general funds account must be spent by the end of the fiscal year (June 30). Any remaining tuition funds revert to the state treasury after June 30. On the other hand, surplus funds that remain in an agency account or auxiliary at the end of a program must be expended within eighteen months from the start date of the program and only for the benefit of the study abroad program. If these funds are not spent by the deadline, they must be returned to the state treasury.

# **Chapter 4**

## **Recruitment, Retention and Enrollment**

- I. RECRUITMENT
- II. SELECTION OF PARTICIPANTS
- III. SPECIAL RECRUITMENT EFFORTS FOR UNDERREPRESENTED STUDENTS
- IV. DEVELOPING AND TRACKING APPLICATION MATERIALS
- V. STUDY ABROAD PROGRAM ACCEPTANCE PACKETS
- VI. WORKING WITH STUDENTS FROM OTHER CAMPUSES

### **I. RECRUITMENT**

When recruiting students, remember that these are students with whom you may be spending a great deal of time, especially if you will be directing or managing the program while abroad. Initial program participants will have an enormous impact on the success of the program. Therefore, careful consideration must be given to whom and by what means you will recruit students. These students will also represent your program as alumni in the following years. Thus, it is important to balance the need for sheer numbers of participants with the need for good participants. As you try to interest students in your program, it is equally important to be honest with students who would not benefit from the program. You must express the program's limitations as well as its strengths. This will increase the likelihood that the participants recruited are a good match with the program's goals and objectives.

It is important to view recruitment and publicity as an ongoing process for promoting study abroad in general. Publicity should be used not only to promote specific programs, but also to educate students about the value and accessibility of study abroad. This can only be achieved if students are consistently reminded about education abroad and its effects on personal development. In order to recruit effectively, your recruitment efforts should employ a variety of means and target specific prospective students in order to be successful.

#### **RECRUITING STUDENTS THROUGH PERSONAL CONTACT**

##### *Using Faculty to Recruit*

Program directors will often enlist the help of faculty members in identifying prospective participants. Relevant departments should be targeted, and faculty from those departments should be actively involved in promoting the program. Faculty support is crucial to successful recruitment. Students are strongly influenced by faculty members' advice regarding the advantages of studying abroad as well as the quality of a specific program. Provide information

sessions for all interested faculty and administrators. If possible, try to arrange for faculty to visit the study abroad site or program while in session to observe it first-hand. Faculty should be familiar with the program(s) for which they are recruiting. Make sure that faculty and relevant departments have plenty of program publicity materials.

*Ask faculty to:*

- distribute program materials in their classes
- identify students who might be good participants
- allow program directors to visit their classes and make short presentations

*Student Organizations*

Try to arrange meetings with student organizations or clubs. The student affairs office on your campus can be a good resource for contacting student groups that may be interested in your program. The student activities office will be able to give you a schedule of any upcoming events or speakers which relate to your program. A short presentation to relevant student groups or in conjunction with related events or speakers is a good recruitment tool because you will be reaching an audience that should already be receptive to the concept of study abroad.

*Residence Halls*

By speaking at orientations or in residence halls, you have an opportunity to reach students who may be may not come to you about studying abroad. These are especially important venues for programs that are broad in focus and need to recruit large numbers of students, as they reach a large and diverse audience. When making presentations to students, it is important to be well-prepared, to hone your speaking skills, and to maintain students' interest.

*Information Sessions/Study Abroad Fairs*

Information sessions and study abroad fairs are excellent opportunities for you to reach interested students. Study abroad fairs are held at many USG institutions, and if you plan to recruit students from outside of your own institution, you should make plans to attend these study abroad fairs. If your study abroad office sponsors regular study abroad information sessions, ask if your program could be featured during a session. Information sessions are a good means of reaching students at your own institution and providing them with more in-depth information about study abroad. Information sessions can be held in the residence halls or in the student center or in a location where many students tend to congregate. Because of normal demands on students' time, the sessions should not exceed 60 minutes.

Students who have participated in study abroad programs should be involved in the sessions whenever possible - returnees are often your best resource for recruitment. Ask study abroad alumni to accompany you when you will be meeting with groups. They will be excited to share their experiences and able to relate to students and their questions, and will have a fresh perspective to offer students.

### *Recruiting the whole family*

In the recruitment process, keep in mind that students' parents, spouses, and/or other significant family members should not be overlooked. Most students work together with their parents in planning an overseas experience. As a program director, you may work with families at all stages of the program cycle: from inquires and submission of applications to the pre-departure and re-entry adjustment phases. You will also frequently encounter parents inquiring about your program on behalf of their son or daughter. By stressing the student's role, you will have the opportunity to make the student and his or her parents realize that the responsibility for preparing for an overseas program ultimately rests upon the student's shoulders. If they want to make an appointment with you to gather information or to ask questions, they should do so accompanied by their son or daughter. This will give you the opportunity to determine whether your program is a good fit with the student's academic goals and aspirations. During the meeting with parents, be prepared to discuss the details of program expenses, a projected budget for students, payment deadline dates, cancellation policies, curriculum, safety and culture in the host country, and other issues of concern to parents. If parents are hesitant about their child embarking on a study abroad program, this is a good time to allay their fears and help them realize that the program is designed for the student.

### *NOTE:*

*Be mindful of FERPA rules when disclosing information to parents or other family members. Check with your registrar or student affairs office if you need guidance about FERPA disclosure rules.*

### MEDIA AND PUBLICITY

Publicity materials must be relevant to the interests and needs of the students. Numerous programs and activities compete for students' attention. Therefore, your program's publicity must be more enticing than that of your competitors. It is important to consider the following in developing you publicity:

- Publicity must catch and sustain students' interest and cause them to act.
- Publicity should emphasize how the program meets the needs of the students.
- Publicity must always provide an honest and realistic picture of what the program offers.

To publicize study abroad programs, the following media should be utilized:

- **Brochures** should comprehensively explain all aspects of the program. These may be distributed in a variety of ways to your target groups - at study abroad fairs, through relevant academic departments, at orientations, and to student groups whose members may be interested in your program.
- **Posters** should be prominently displayed throughout all areas of campus, including the student center, residence halls, classroom buildings, hallways, restrooms, library, dining facilities, and areas that the target group frequents. If possible, brochures may also be made available at these locations.
- **Flyers** should also be distributed on a regular basis to academic deans, department chairs and other faculty and staff as well as leaders of student groups, clubs, organizations and other societies.

All brochures, flyers and posters should always display prominently:

- the program term and year
- the name of the sponsoring institution
- a web site for the program
- the contact information for the program sponsors

### *Videos*

If you have the opportunity and the funds, consider having a high-quality video produced that depicts the salient features of your program and its location. Take the time and money to invest in and maintain a high-quality production. A poor quality video may become a hindrance rather than an asset.

### *Web sites*

It is essential to create a Web site. Most students begin exploring their opportunities online. Web sites will assist with the dissemination of information to students. Unlike a brochure, a Web site can be updated throughout the year and is a good resource for posting the most current information available. It is an inexpensive way to communicate details of your program that will not fit into a small brochure. However, because most people do not like to read large amounts of text online, you must strike a balance between too little and too much information. You may also wish to include an option to request information via email. It is essential that Web site information be updated on a regular basis so that it remains current and useful.

### *Local Media*

Program directors should also contact campus and local newspapers, radio stations, and TV stations. Feature stories may include photos and interviews with program alumni. These campus and community resources will often make public service announcements for free, and by using such media, you will reach a wide audience. You may also want to take advantage of closed-circuit campus TV, links to your institution's start-up Web page, or other institutional Web sites.

### *Funding*

Funding for media publicity can come from a variety of sources, such as the program fee, study abroad office, or other administrative offices. Often, program directors will tap campus and community agencies for help with creating publicity materials. Students and program alumni who have skills in journalism and media arts are good resources at a low cost. You can also provide returnees with t-shirts, keychains, hats, or other paraphernalia with your office logo and the text "Ask Me Where in the World I've Been."

## **PUBLICIZING YOUR PROGRAMS IN THE SYSTEM CATALOG OF STUDY ABROAD PROGRAMS**

Listing a program in the online *University System of Georgia Study Abroad Catalog* provides another opportunity to publicize a program to the entire USG student population. There is no cost for listing programs in the catalog. Study abroad programs must be approved by the home campus before being listed in the catalog. Please see Chapter 10 for information on approval for new study abroad programs and for an instruction sheet about online submission of program information. Updates to existing program entries and new program entries are all completed online at the following Web site: <https://www.usg.edu/oie/StudyAbroadCatalog/>

## II. SELECTION OF PARTICIPANTS

Selection criteria must reflect the program's purpose as defined by the institution's resources, needs, and philosophy. Criteria will vary from program to program and may or may not include prerequisite classes, minimum academic levels, language ability, or scholastic achievement. All overseas programs should have a standard policy with well-defined selection criteria.

Care should be taken to create a selection process that will assist both the participants and the program director in determining whether the program will satisfy the specific needs of both parties. To create such selection criteria will mean that students going abroad are accepted because they are ready to go abroad, not because of an arbitrary design in program admissions.

Traditionally, study abroad participants have been those with above-average scholastic performance. However, academic performance should not necessarily be an admissions requirement for study abroad programs. If *preference* will be given in the admissions process to those students with a higher GPA, this should be made clear to applicants. Identifying *preferences* in the selection process will help ensure that students admitted into the program fit well with the structure, scope, intent, and preferred outcomes for the program. The selection criteria for admissions should exist to support these program elements. If your program is a reciprocal exchange program or part of a consortium, the admission requirements will need to be aligned with those of the other institutions involved.

Your program may need to recruit students from other institutions to supply a sufficient number of students. If you are going to a relatively unknown or less popular destination, off-campus recruitment might be essential. Bringing together students from different campuses encourages students to interact with people from different areas and backgrounds. Larger enrollments reduce the per-person cost of the program and may make you eligible for certain discounts from third parties that are providing various services (e.g., travel, accommodations, meals).

Transient students and minors must be given special consideration in issues of selection. The enrollment of minors in study abroad programs has legal implications which must be addressed, such as obtaining appropriate release forms and the need for additional supervision while overseas. Check with your institution's legal counsel to discuss potential complications in allowing minors to participate. Conducting interviews to determine the suitability of these applicants is recommended. Because you may not have as easy access to information about transient students as you



might students from your own institution, you may need to require that transient students submit current transcripts and transient permission forms from their home institutions.

## SELECTION CRITERIA

As previously mentioned, the selection criteria should support the purpose of the program's design. Below are selected criteria and circumstances when these additional criteria might be necessary:

### *Academic Level*

- prerequisites or class standing as prerequisites
- partner institution requires a particular academic standing

### *Prerequisite Courses*

- program includes upper-division courses
- prior knowledge is an important predictor of success in the program

### *GPA*

- director believes that GPA can be used as a predictor of success in the program
- GPA reveals a student's mastery of a specific subject or field

### *Foreign Language Skills*

- language proficiency determines placement courses abroad
- a specified level of proficiency in the foreign language is deemed necessary for a successful study abroad experience

### *Interview*

- to find out qualitative information about a student
- to verify a student's understanding of the nature and rigors of the program
- to determine foreign language capability
- if the student's level of preparedness is doubtful

### *Essay*

- to ascertain a student's personal and academic objectives

### *Reference Letters*

- to provide additional insight into a student's character and experience

## DEADLINES FOR APPLICATION MATERIALS

The deadline for receipt of admissions materials must be set early in the program design process. When determining this date, program directors should consider how quickly admissions decisions can be made and if the time frame selected gives students ample time for necessary preparations. Items to consider when setting this date include the following:

- Will you use a waiting list?
- Will applications received after the deadline be considered in the event of cancellations or space availability?
- Who will evaluate the applications?
- How much time will students need for necessary inoculations?
- If a sufficient number of students have not been recruited by the application deadline, will students have enough time to find a suitable replacement program?

Program directors without prior experience in evaluating applications should seek advice from experienced and knowledgeable administrators on their campus. The admissions office, study abroad advisors, and legal affairs staff can provide useful information.

### **III. SPECIAL RECRUITMENT EFFORTS FOR UNDERREPRESENTED STUDENTS**

Study abroad is a vital component of a student's higher education experience, whether for internationalizing a degree program, preparing for a career in an interdependent world, personal enrichment, or perfecting a foreign language. Despite the increasing numbers of U.S. students studying abroad, various populations of students remain underrepresented. As a program director, seek ways to diversify your program and recruit these students.

#### **OBSTACLES UNDERREPRESENTED STUDENTS MAY FACE WHILE STUDYING ABROAD**

Various student populations do not study abroad in proportion to their numbers on campus. Traditionally, ethnic minorities have been underrepresented in study abroad. Female study abroad participants tend to outnumber male participants, and non-traditional (over age 26) and two-year college students are also not well represented abroad. This holds true for gay and lesbian students as well. While liberal arts majors have many options for overseas study opportunities, students in majors outside the social sciences and humanities often have fewer program choices and therefore do not study abroad in proportion to liberal arts majors.

These underrepresented groups encounter additional challenges when faced with the prospect of studying abroad. Minority students may be concerned about facing discrimination from host country nationals, and these fears may be compounded by the fact that their support system of family and friends will not be readily accessible while they are abroad. Disabled students may fear a lack of understanding and acceptance from classmates and host country nationals, and overseas cities and towns may not be handicap-accessible. Fears concerning a lack of acceptance in a

foreign country and the potential for reprisal from host country nationals may be obstacles for gay and lesbian students considering study abroad. These fears, combined with the possibility that they may have to temporarily change public behavior while overseas, may deter gay and lesbian students from studying abroad. Many non-liberal arts majors have difficulty in finding the classes overseas that they need to fulfill graduation requirements. Their degree programs may require that they complete a sequence of courses at the home campus in a specified period of time or risk not graduating on schedule, making it difficult for non-liberal arts majors to justify the time spent overseas.

### **RECRUITING STUDENTS FROM UNDERREPRESENTED POPULATIONS**

To generate an awareness of study abroad opportunities and attract students who are typically underserved by study abroad, you may wish to employ the following targeted recruitment strategies:

- Create advertising that responds directly to these special groups' concerns.
- Include pictures and quotes of underrepresented students on flyers and handouts, and post advertisements in areas that are frequented by these students. These areas may include: offices for disability services and minority services; commuter student advisors' offices; student unions and activities centers; study abroad offices; and other administrative offices such as financial aid or student employment office.

To contact and recruit underrepresented students:

- Attend high school minority, disability, and general student recruitment fairs.
- Attend new and transfer student orientations.
- For resources on study abroad program access for disabled students, contact Mobility International U.S.A., [www.miusa.org](http://www.miusa.org) or at 132 E. Broadway, Suite 343, Eugene, OR 97401; phone: (541) 343-1284, e-mail: [miusa@igc.apc.org](mailto:miusa@igc.apc.org).
- Contact sororities and fraternities; internationally focused clubs and organizations; minority organizations; organizations for disabled students; commuter student organizations; and academic student organizations or honor societies, especially those in business, science, and education.
- Conduct class presentations in targeted majors.
- When attending fairs and orientations or when visiting classes and student groups, have prior study abroad participants from these special populations talk to and encourage participation from underrepresented students.
- Hold information sessions in conjunction with appropriate events such as Black History Month, science fairs, and other activities which may draw participants from underrepresented student groups.
- Forge alliances with campus administrators such as directors of minority student, disability services, and commuter student affairs offices. Ask them to aid you in the recruitment process by identifying students who would be particularly interested in and qualified for your program.
- Cultivate relationships with faculty and department heads of disciplines in which few students study abroad. Form alliances with faculty in fields of area studies and in the non-liberal arts colleges.

- If you are developing a program for students who work part- or full-time, have families to support, and/or have additional obligations, consider creating a program in which courses are taught on the home campus and then combined with a short (1 month or less) period of overseas study. Such programs permit these students to satisfy job and family obligations and have a study abroad experience.
- Determine how federal, state, and institutional aid may be used towards the cost of the program.
- Encourage students to begin their research on scholarships early so that they can meet required deadlines.

### **THE RECRUITER'S RESPONSIBILITY TOWARD UNDERSERVED STUDY ABROAD PARTICIPANTS**

In committing to recruit underrepresented students, program directors have an obligation to counsel them regarding what they may encounter while overseas, including:

- a different level of discrimination than that which is present on the home campus
- a lack of accommodations, services, or resources for the physically challenged
- a homophobic environment and possible need for adjustment in public behavior
- the difficulty they may experience in being away from their support network

You should be sensitive to the concerns of parents/guardians or spouses of underrepresented students, and it may be necessary to provide these individuals with additional information. You may want to provide minority and disabled students with information provided by Mobility International USA or the Students with Disabilities Alumni Project, administered by NAFSA and CIEE. Information regarding the latter project can be found on CIEE's Web site (<http://www.ciee.org/>). Both resources provide networks of minority and disabled study abroad alumni who are willing to share their experiences with interested students, faculty, and administrators.

## **IV. DEVELOPING, PROCESSING, AND TRACKING APPLICATION MATERIALS**

Application materials for study abroad programs are often divided into the pre-acceptance stage and the post-acceptance stage. The pre-acceptance materials will provide the applicant with basic information and evaluative forms. The post-acceptance materials provide the program director with more descriptive information that may directly affect the student's overall experience while on the study abroad program. Information obtained at both stages is crucial to students' participation in the program. It is helpful to think of the application form as your most valuable permanent record of information on each student accepted into the program. You will likely turn to the application form for routine and emergency matters related to the student.

### **PRE-ACCEPTANCE APPLICATION MATERIALS**

The preliminary application form should ask students the following information:

- full name (as it appears on the student's passport) and preferred name
- current address and phone number
- permanent address and phone number

- e-mail address
- date of birth, academic level
- major
- student ID number
- parent/guardian or spouse contact information
- any information required by study abroad officials on your campus for institutional, USG, and national statistics
- the term for which the applicant is applying
- the application processing fee, to whom the fee should be paid, the deadline for fee payment, and the policy regarding any refunds
- questions pertaining to disciplinary and criminal records (requires a release for access to this information)
- the means by which the applicant learned about the program

*NOTE: Questions related to health, race, gender, or disabilities legally cannot be asked and photographs should not be requested before students are accepted into the program.*

Evaluative materials that may be used to determine whether the applicant meets selection criteria include transcripts, letters of recommendation, foreign language proficiency test scores, personal essays, and interviews. Evaluative materials will vary from program to program, and some programs will ask students to submit more material than others. However, some type of evaluative materials that will assist in subjective evaluation of students' character, maturity, and suitability for study abroad should be included in all study abroad program applications.

Program directors should respond to student applicants immediately upon receipt of application materials. A follow-up letter should list the specific information received, the date on which it was received, and materials still needed to complete the application. Applicants should be asked to review and verify the information that has been recorded (e.g., name, date of birth, and contact information). As additional information is received, program directors should contact applicants accordingly. If applicable, program directors should attempt to schedule student interviews soon after the receipt of application materials. Following those interviews, students should be quickly notified about their study abroad program acceptance status.

### **POST-ACCEPTANCE MATERIALS**

Acceptance packets and rejection letters should be mailed to applicants as soon as possible. Rejection letters should clearly indicate the reason why an application did not meet the requested criteria. Rejected applicants should be given the option to contact the program director and discuss their application in more detail. If rejection is based upon the interview, a clear indication of why the applicant was not selected should be noted. If appropriate, suggest that the student apply again at a later date or refer them to the campus study abroad office for information about other overseas opportunities.

### **TRACKING APPLICATIONS**

Study abroad program directors must also have a comprehensive tracking and storing system for student applications. Each student's file should contain a hard copy of any information recorded in a database as well as signed consent and release forms. A checklist in each student's file is helpful in keeping track of required information. Since a database can be stored on a laptop computer, the database can be easily accessed by the program director as needed. However, since this is a student record database, access to this information must be safeguarded by making the database password-protected.

The many functions of a database will enhance the organizational and tracking procedures of your program. The creation of a database will help you before, during, and after your study abroad program. A database will allow you to: track applicants with incomplete files, applicants on the waiting list, and applicants who have withdrawn; sort data and merge data into documents for mass mailings; and rapidly produce current reports, labels, and statistical printouts. A database containing information on your program participants will allow you to generate statistics for your own use, for your institution and for the University System of Georgia Office of International Education. If you create your own database, there are many, easy-to-follow guidebooks for a wide range of database software. The database need not be complex; the most basic information necessary for tracking students is:

- name
- local and permanent addresses
- local and permanent phone numbers
- e-mail address
- student campus ID number
- name of student's home institution
- emergency contact information

More detailed information may include:

- academic level
- academic major and/or minor
- overall GPA
- race
- gender
- application/payment status
- any dietary restrictions
- any accommodation or special services needed
- housing assignment
- program course selection and enrollment hours
- financial aid status
- citizenship and passport number
- whether a waiver of liability has been signed by the student
- how participants learned about your program
- a *special notes* section

Upon completion of the program, program directors should continue to maintain the database of past program participants but should be sure to have participants sign a release agreeing to be contacted by future participants. A

well-maintained returnee database can prove to be a valuable resource for your program. As mentioned, alumni of study abroad are often its strongest supporters. Past participants may aid in recruitment efforts, pre-departure or orientation sessions, contribute to a program's scholarship fund, or enhance programs in other ways. In cooperation with your alumni office, you may also wish to monitor program returnees' achievements and career choices.

## **V. STUDY ABROAD PROGRAM ACCEPTANCE PACKETS**

Acceptance packets are necessary tools for retention and typically initiate the process that students follow to prepare themselves for their overseas study program. The acceptance packet should include general information on how to obtain passports and visas, where applicable, and should provide program-specific information such as the time, place, and date of the pre-departure orientation session, housing options, and, group flight arrangement information. The acceptance letter itself should congratulate the student and should include a deadline for confirming the decision to participate in the program.

A helpful addition to acceptance packets is a checklist of important deadline dates such as the dates by which students must secure passports and entry visas, dates for payment of program fees and flight arrangements, and the date by which students must return the completed legal liability releases, contracts, and other documents.

The following should be included in participant acceptance packets:

### ***PASSPORT/VISA INFORMATION***

Acceptance packets should contain information on entry requirements for the host country and whether or not entry into the country requires a visa. Emphasize that in some cases it may take a long time to secure a visa. Provide the address, phone number, and Web site of the host country consulate in the U.S. and also provide the U.S. State Department's Passport Services Web site ([http://travel.state.gov/passport/passport\\_1738.html](http://travel.state.gov/passport/passport_1738.html)) so that students can investigate passport information on their own. For more detailed information concerning passports and visas, please see Chapter 7 of this handbook.

### ***TRAVEL INFORMATION***

You should also provide detailed information on travel arrangements.

If your program is arranging an international group flight, students will need to know:

- the airline
- the date and time of departure
- the date by which full payment for the flight must be made
- conditions and regulations on making changes to their itinerary

If students have the option of making their own flight arrangements, they will need to know:

- the date they must arrive at the program site

- whether transportation will be available from the airport to their accommodations or the study center

If additional transportation will be used in-country (i.e. domestic flight, train, bus, etc.), be sure to provide enough information to allow students to familiarize themselves with what to expect while traveling. A detailed trip itinerary should also be included.

### ***HEALTH INFORMATION***

A participant health and disability accommodations request form should be included in your acceptance packet. Also, if applicable, notify students of any immunizations and the dates by which they must begin the immunization series. Include the Web site for the Centers for Disease Control and Prevention (<http://www.cdc.gov/travel/>) and recommend that students visit a travel clinic, university health facility, or family physician to receive information, any necessary inoculations, and a check-up prior to departure. Finally, have students verify that they have adequate overseas accident and sickness insurance coverage, including coverage for medical evacuation and repatriation of remains. If the program has a plan under which all participants are covered, explain the terms, limitations, and claims procedures of the group plan. Many programs include mandatory participation in the program's insurance policy to ensure that all participants have an adequate level of coverage while abroad. The USG has secured a study abroad insurance and travel assistance plan for USG study abroad participants. Detailed information on this plan, offered by CISI, can be found at:

[http://www.usg.edu/oie/study\\_abroad/resources/health\\_safety.phtml](http://www.usg.edu/oie/study_abroad/resources/health_safety.phtml)

### ***LEGAL DOCUMENTS***

Include liability release forms, contracts, and other agreements in acceptance packets. Give students instructions for completing the forms and a date by which the forms must be returned. Some of these forms must also be signed by a parent or legal guardian if the student is under the age of 18. If possible, it is preferable that these forms be reviewed at orientation before students sign them. It is a good idea to coordinate with your campus legal officer to have documents reviewed and approved before issuing them to participants. See also Chapter 5 of this handbook for a more detailed discussion of Risk Management issues.

### ***ACADEMIC REQUIREMENTS***

Acceptance packets should include syllabi or course descriptions, class registration forms or instructions on how and when students register, and written policies regarding class drop/add deadline dates and charges (if applicable). Students should also receive clear information on the minimum/maximum number of credit hours for which they must enroll while on the program. Students should list their course selections and alternatives on the class registration form and should return these forms promptly. If applicable, send students from other institutions a transient permission form.

### ***PAYMENTS***



Specify deadlines for payment of program fees, tuition, airfare, special excursions, and other expenses. Refund policies and late payment penalties should be clearly stated. The program's cancellation policies, both for student cancellation or program cancellation, should be clearly explained. Encourage those who have questions regarding your cancellation policies to contact you for further information.

### **INFORMATION REQUESTED FROM STUDENTS**

In addition to providing information for participants, acceptance packets should include information which requests information *from* participants once they are accepted into the program. Only after the evaluative materials have been reviewed and the student has been formally accepted into the program is it possible to request more personal information about each student.

It is also important to have students complete an information sheet indicating the student's local and permanent addresses and phone numbers, e-mail address, and emergency contact information in the U.S. A housing questionnaire is essential in determining housing assignments; it clarifies the gender of each student and verifies whether a spouse or child will accompany participants. Participants should indicate their citizenship and should furnish a copy of their passports. This will help program directors verify that each student has a passport, that the passport is valid for at least 6 months after the planned return date. In addition, passports will help the program director identify any participants who are non-citizens and as such, be subject to any special visa requirements. Directors will also have a copy of the passport in case of an emergency.

Information about medical conditions and requests for accommodations for students with disabilities and other special needs should also be obtained at this stage. Program directors should have pertinent medical information on each student, and should be informed of each student's special health needs in order to make reasonable accommodation (where possible) in the host country. However, students cannot be forced to disclose health/medical information. Failure to provide this information is not a legally valid reason for prohibiting participation.

All personal records of program participants must be kept confidential. Program directors must be familiar with their institution's policies and procedures for the review and dissemination of confidential documents. Directors should also consult with their institution's disability services office for ADA rules and regulations regarding medical disclosure and the institution's responsibilities towards students with disabilities.

## **VI. WORKING WITH STUDENTS FROM OTHER CAMPUSES**

Registration and enrollment procedures vary among programs and campuses. Since you are familiar with your institution's procedures, you can assist study abroad program enrollment for students from your own institution.

However, enrollment and registration for students from other campuses can be complicated by financial aid and acceptance of academic credit. See the sections on administrative structures, financial aid, and curriculum and academic issues for further details.

The University System of Georgia Office of International Education encourages statewide organization and inter-institutional support of international endeavors; therefore, students from other Georgia institutions may enroll in your program. As you prepare to enroll students from other campuses, you may wish to make improvements that better address the needs of transient students.

### **TRANSIENT STUDENTS**

The most basic way to look at transient student issues is to consider the expectations you would have for your own students enrolling elsewhere. If students find out that credits from your program may not be accepted at their home institutions because they have not completed required paperwork, they may cancel at the last minute. Many program directors include a section on the program application form that must be completed and signed by at least one official (e.g., study abroad advisor, academic advisor, or dean) at the student's home campus to indicate that such paperwork has been completed.

### **TRANSIENT ENROLLMENT/REGISTRATION**

Do not expect students from other campuses to be familiar with procedures on their home campus for obtaining transient permission or transferring credits. Also, keep in mind that your institution's procedures on resident students becoming transient students elsewhere may be very different from procedures at other institutions.

Determine whether your campus has established transient student enrollment and registration procedures for study abroad participants. Transient students should be provided with official documentation from the sponsoring institution that indicates the classes for which they are enrolled. They should also be informed of the drop/add procedures at your institution. In some cases, the drop/add procedures for your program will be different from those at your institution. Ensure that transient students complete necessary study abroad credit transfer approval or transient permission forms required by their own institutions, indicating that the home institution recognizes and approves of the program.

In cases where a program is particularly popular for students from one campus, it is not uncommon for directors to become knowledgeable about the paperwork required at that institution. In some situations, a program might even have a representative on another campus who can advise students about procedures related to the program. For example, certain programs sponsored by the USG's World Regional Councils (Africa, Americas, Asia, or Europe Council) may have a representative of that program on a student's home campus. If you work with a program representative who is at another campus, it will be important to provide annual training and detailed information about any and all changes that have been made to the program. The role of that campus representative must be made clear to students.

### **FINANCIAL AID FOR TRANSIENT STUDENTS**

The way students from other campuses register will affect how the students' home institutions or your institution will award and distribute aid to the students. If they are eligible to receive student financial aid, students may use their federal (Title IV funds), state (e.g., HOPE Scholarship), and institutional aid for studying abroad provided that credit for the program has been pre-approved and accepted for transfer by the student's home institution. Speak with financial aid officials on your campus about relevant processes and practices (e.g., financial aid consortium agreements, disbursement dates for aid, and adjustment of aid based on program cost).

### **ORIENTATION FOR TRANSIENT STUDENTS**

Pre-departure orientations are a vital aspect of the study abroad experience. If your program is designed to require students to attend any classes prior to departure or upon return from overseas, you should examine the impact this will have on transient students. Publicity materials should emphasize any such unique program elements. Since the pre-departure orientation provides students with information that can be used immediately upon arrival in order to ease the transition into the host country, it is imperative that students from other campuses receive an orientation. Separate written materials can be sent to them, or their participation in orientation may be required. You may also wish to hold collaborative orientation programs with other USG institutions.

### **OUT-OF-STATE STUDENTS**

The Board of Regents of the University System of Georgia has provided that USG institutions may set the out-of-state fee at a maximum of \$250 for study abroad participants from out-of-state. Thus, these students pay in-state tuition plus the fee set by each institution. Further, students coming to your institution through direct, one-to-one exchange programs also pay in-state tuition. Confer with financial officials at your campus about these options.

## **INTRODUCTION**

With the rising numbers of students participating in study abroad programs, University System of Georgia institutions, administrators, and faculty need to be mindful of the risk management issues that affect study abroad. Study abroad professionals and program directors are expected to make appropriate and effective decisions in light of relevant professional standards and ethics, institutional policies and practices and local, state, and federal laws and regulations. In addition, the professionalism of the international education field has led to the establishment of guidelines and accepted practices which aid in the development of institutional policies.

Although space does not permit an exhaustive examination of all of the risk management issues related to study abroad, basic elements of specific issues will be reviewed. The purpose is to provide guidance concerning the risk management issues which play a role in the overall planning, implementation, and execution of a successful and safe program. If the material presented generates specific legal questions for you, seek the advice of a campus attorney or attorneys who work for the University System of Georgia.

A preliminary set of guidelines concerning recommended practices for study abroad professionals is provided by NAFSA - The Association of International Educators. Its Interassociational Advisory Committee on Safety and Responsibility in Study Abroad publishes a document entitled "Responsible Study Abroad: Good Practices for Health and Safety". This document outlines, among other things, general guidelines and statements for good practice pertaining to the responsibilities of program sponsors and participants. This document can be found on the NAFSA website using the following link: [http://www.nafsa.org/knowledge\\_community\\_network.sec/education\\_abroad\\_1/developing\\_and\\_managing/practice\\_resources\\_36/guidelines\\_for\\_health](http://www.nafsa.org/knowledge_community_network.sec/education_abroad_1/developing_and_managing/practice_resources_36/guidelines_for_health) and is provided in its entirety in at the end of this chapter.

## **INSTITUTIONAL STUDY ABROAD COMMITTEE**

Institutions should identify a campus based study abroad committee which specifically deals with addressing the particular issues pertaining to study abroad programs, including risk management. Such a committee or advisory board may consist of a combination of administrators from the following offices:

Office of International Education  
Study Abroad Office  
Office of Student Affairs/Student Life  
Legal Affairs Office  
Faculty/staff study abroad program directors  
Disability Services  
Health Services  
Office of Counseling and Psychological Services

An institutional study abroad committee might be responsible for:

1. reviewing approval requests for new study abroad programs
2. evaluating existing programs
3. establishing emergency response procedures in the event of an incident which involves students on study abroad programs
4. developing institutional risk management policies for study abroad programs as necessary
5. developing study abroad policies based on established institutional policies for drug and alcohol use, disciplinary infractions, and other incidents
6. recommending suspensions or relocations of existing programs due to changes in program particulars

### **APPROVAL, INVENTORY AND DATABASE OF STUDY ABROAD PROGRAMS**

#### Institutional Inventory and Approval Process

In an effort to centralize study abroad policies, procedures, and information as much as possible on a campus and in light of risk assessment and liability issues, it is essential that institutions establish a program approval process and conduct a campus wide inventory-taking of study abroad programs. There may be cases on a campus when a faculty member or academic unit proceeds with study abroad program development without requesting or after rejecting the assistance or input of the international office. There may also be no centralized international office on a campus to which faculty or departments can go for assistance. However, it should be an institutional priority to make sure that all study abroad programs are accounted for and that there are policies and procedures in place which provide consistent treatment of those programs, wherever possible.

#### USG System Inventory and Approval Process

The Office of International Education (OIE) of the University System of Georgia is responsible for maintaining a database of study abroad programs that are operated by USG institutions. Every study abroad program sponsored or approved by a University System of Georgia (USG) institution must be authorized by the president of the institution, or his/her designee, under the authority delegated to the institutional presidents by the Chancellor. In accordance with those procedures, a completed "Study Abroad Program Approval" Form (available on-line at [http://www.usg.edu/oie/facstaff/policies/usg\\_rfa.pdf](http://www.usg.edu/oie/facstaff/policies/usg_rfa.pdf)) must be submitted to the OIE.

In addition, the OIE maintains an on-line catalog which provides profiles of USG system study abroad programs. This catalog is accessible by the public and functions as a recruiting tool for system institutions which want to advertise their programs around the state and across the country. Information on how to submit materials for submission to the catalog is available from OIE at <https://www.usg.edu/oie/StudyAbroadCatalog/>.

The catalog is located at <http://www.usg.edu/oie/catalog/>

### **RISK ASSESSMENT AUDIT**

Although a basic understanding of risk management issues related to study abroad is essential to establishing a successful and safe program, institutions should consider undertaking a risk assessment audit which consists of a comprehensive review of key health, safety, and liability issues and conditions of an education abroad program. The suggestions listed below, in addition to materials provided by outside sources, are tools for understanding risk and how to manage it. Faculty and staff can identify additional matters which apply to individual campuses and programs.

Some steps that are part of the risk assessment audit for study abroad programs may include:

1. Comprehensive review by in-house counsel of policies and procedures for program approval and management
2. To the extent possible, conduct a site visit at the location abroad which includes a walk-through of facilities, assessment of host country conditions, and review of overall safety and security issues
3. Review of host location policies and procedures with regard to their consistency with home campus policies and procedures, and compliances with US law
4. Review of orientation, promotional, and marketing materials for the program, as well as any agreements, contracts and waivers

The SAFETI (Safety Abroad First - Educational Travel Information) Clearinghouse Project develops and disseminates resources to support study abroad program development and implementation, emphasizing issues of health and safety.

SAFETI has developed a comprehensive Program Audit Checklist, the purpose of which is to provide a list of health and safety and study abroad issues that an institution can use as a guide to look at the current policies and procedures which it has in place. The checklist is linked to internet resource links which provide background information on each item and samples of policies and procedures from other study abroad programs as well as useful internet links. This material is provided as a guide only and any and all procedures developed should be subject to institutional or BOR review.

The SAFETI checklist can be found at the following website:  
<http://www.globaled.us/safeti/auditchklst.html>

### **RESPONSIBILITIES OF PROGRAM/FACULTY DIRECTORS AND PARTICIPANTS**

When considering risk management issues as they pertain to study abroad it is important to focus on professional management of the study abroad program, and adherence to

established institutional rules, regulations, and procedures. Study abroad programs should be designed with attention to the overall quality and safety of the program. In addition, all college and university personnel who lead programs should understand what is considered appropriate and inappropriate personal and professional behavior and be trained to deal with emergency situations and student issues as they arise and as they would be dealt with on campus.

In general, most legal standards are based upon what a reasonable and prudent person should do. Faculty and program directors are expected to use their best judgment in deciding what is appropriate conduct in a given situation. Program directors can best serve themselves and their students by careful pre-trip preparation. Once on site, they need to be alert to conditions and current events in the host country and region and to problems that students may experience. If all actions taken in the case of an emergency or incident are taken with the student's best interest in mind, most legal obligations will be met.

### **AGREEMENTS, WAIVERS AND OTHER DOCUMENTS FOR PROGRAM PARTICIPANTS AND LEADERS**

There are a number of different documents and waivers that can be used in conjunction with study abroad programs. These documents, which generally require the signature of the participant, are designed to provide legal information to the participant in terms of obligations, responsibilities, and deliverables and to provide the study abroad office or program/faculty director with assurances that the participant is informed and aware of specific rules, regulations and procedures associated with participation. Please note: it is imperative that each institution's legal counsel or the BOR legal counsel review any forms, waivers, or applications.

Generally speaking, institutions will want forms in the following areas:

#### **Participation Agreement**

This document is signed by students as an acknowledgement that they are aware of financial and personal responsibilities and agree to abide by the program's rules and codes of conduct. This may also include clauses pertaining to academics, alcohol and drug abuse regulations, and disciplinary rules, cancellation/withdrawal policies and refund policies. Other conditions may be attached depending on the needs of the office and programs.

#### **Release, Waiver of Liability and Covenant not to Sue**

This document is typically drafted by university or college legal counsel and signed by the participant. Waivers and agreements should be adapted specifically for each program, mentioning the risks for each program's events and activities. It is also imperative that study abroad administrators and/or faculty directors review the documents with participants as part of pre-departure orientation and remind them of their responsibilities with regard to the agreement.

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All participants should be given one copy of the agreement and waiver to sign and submit and one to keep. Study abroad offices and program/faculty directors should have access to these documents as well.

### **Confidential Health Record/Medical Information Form**

While study abroad offices cannot require students to provide medical/health information, this form provides students with an opportunity to disclose any existing medical conditions or concerns. It is useful in the case of a medical emergency and also as a main vehicle for disclosing any special needs a student may have. Students who seek accommodation must disclose any existing condition so the program providers may consider appropriate accommodation. This information typically is collected after the student has been accepted to a program to eliminate the possibility that a student is rejected because of a disability or chronic illness. Forms should request information about pre-existing medical conditions (physical and mental), medication, allergies, diet, handicaps, and emergency contact information. Another point to consider is that student health information is personal and private and appropriate methods should be taken to ensure confidentiality of records. Medical information should always be easily accessible to the program/faculty director while the group is abroad.

### **Emergency Medical Care/Contact Authorization Form**

This form is essential for collecting emergency contact information in the case that parents or guardians need to be contacted. A list of all participants and their emergency contact persons and numbers should be submitted by the program/faculty directors or collected by the study abroad office prior to departure. A copy of this information should be distributed to any parties who may be involved in an emergency protocol plan.

### **Program Director Responsibilities Contract**

In addition to signed forms that may be required of participants, study abroad offices and programs may want to require program/faculty leaders to sign a document which outlines expectations and responsibilities of on-site program/faculty directors. This document should be tailored to the individual program and provide specifics where necessary and pertinent. It should also make reference to on-campus policies that pertain to faculty and staff leading study abroad programs including alcohol and drug use, sexual harassment, and general codes of conduct.

Samples of all forms mentioned above are provided at the end of this chapter.

### Americans with Disabilities Act (ADA)

The Americans with Disabilities Act provides civil rights protections to individuals with disabilities and guarantees equal opportunity for individuals in accessing public transportation, accommodations, employment, state and local government services, and telecommunications. An individual is considered to have a disability if he or she has a physical or mental impairment that substantially limits one or more major life activities



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such as seeing, hearing, speaking, walking, breathing, performing manual tasks, learning, self-care, or working. The ADA calls for reasonable accommodation to enable a disabled person to accomplish the same task as a non-disabled person.

For more information on the ADA and study abroad, please refer to NAFSA's *Best Practices in Addressing Mental Health Issues Affecting Education Abroad Participants* document, available at

[http://www.nafsa.org/knowledge\\_community\\_network.sec/education\\_abroad\\_1/developing\\_and\\_managing/document\\_library\\_30/managing\\_programs/best\\_practices\\_mental](http://www.nafsa.org/knowledge_community_network.sec/education_abroad_1/developing_and_managing/document_library_30/managing_programs/best_practices_mental)

### Family Education Rights and Privacy Act (FERPA)

FERPA is a federal law which protects the privacy of student educational records. In the study abroad context, administrators and faculty should understand their institutions' policy on how and under what circumstances information may be shared within the campus community and with parents or third parties. Learning how to talk to family members, friends, and third parties without violating data privacy is important within the context of FERPA regulations.

## **ORIENTATIONS**

Detailed information on pre-departure orientations is provided in Chapter 7 of this handbook. However, it is crucial to stress the importance of providing for and requiring students and faculty members to attend pre-departure orientations. In addition to the benefit of increased student and faculty/staff preparedness, orientation programs can help to reduce institutional liability.

Make every effort to provide at least one pre-departure orientation meeting for students. Offices or program/faculty directors may also want to invite parents to attend. It makes best sense to have one general information meeting for all participants if there are a number of programs. It is also very useful to have individual program orientations lead by a faculty member, where appropriate.

In addition, institutions should make every effort to provide orientation and informational meetings for program/faculty directors prior to the student orientations. This provides program/faculty directors with an opportunity for discussion and consultation with various administrative offices including general counsel, counseling services, student affairs, academic affairs, disciplinary offices, and student life. It also promotes institutional support and collaboration in the study abroad process. Some topics for the program/faculty director orientation might include:

1. Program/faculty director responsibilities, responsibilities of others
2. Budget/finances policies and procedures

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3. Leading student orientations ( pre-departure and on-site overseas)
4. Students with disabilities or special needs; handling disciplinary issues
5. Health/safety/liability issues and emergency response protocol
6. Group dynamics

It is also useful to have a program/faculty director handbook which leaders can take on programs for reference.

For more information, see Chapter 7 (Before and After Going Abroad) of this handbook. At the end of this chapter are comprehensive checklists of topics for orientations for students and program/faculty directors.

### **HEALTH AND SAFETY CONSIDERATIONS**

Encouraging students to take responsibility for their health and well-being while abroad will assist them in maximizing their experience. To help them in this endeavor, program/faculty director and study abroad staff, should:

1. increase students' awareness of the health and safety issues that may affect them
2. facilitate students' understanding of the choices available and their respective consequences
3. explain the importance of taking responsibility for their actions.
4. identify the benefits to be gained from healthy and balanced living
5. encourage students to learn about the health and safety issues specific to the location of their program

#### **PHYSICAL HEALTH**

Health issues which affect students while abroad range from routine ailments (e.g., flu, toothache, broken limbs), to common travel disorders (e.g., diarrhea), to life-threatening world health concerns (e.g., HIV and AIDS), and to region-specific illnesses (e.g., malaria). Any students with pre-existing health conditions (e.g., diabetes, epilepsy) must also consider how their condition will affect or be affected by their overseas experience. In preparing students for programs, study abroad offices and program/faculty directors should:

1. Make students aware of the various illnesses which can affect them while abroad. The campus health service, public health service, and/or local health clinic may have free brochures to distribute to students. Staff members from these offices may be willing to attend your orientation program. Consult the Centers for Disease Control and Prevention ([www.cdc.org](http://www.cdc.org)) for information about world, regional and local health issues and provide this information to students or require them to research on their own. Campus or the public health services in the community may assist you in explaining various illnesses and their transmission, prevention, and treatment. Check to see if there is a travel clinic in your area which can provide information on common travel disorders. Include information on protection against sexually transmitted diseases for your students at

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orientation.

2. Encourage students with pre-existing conditions to discuss their health needs so that appropriate accommodations may be researched. Be sure to follow ADA regulations about disability disclosure.
3. Advise students how to take proper precautions while overseas.
4. Inform participants how to locate medical and emergency assistance in a foreign destination.

### NUTRITION

A different diet may affect students while abroad. Provide student with ways to supplement deficient diets and give advice on general nutrition. Study abroad offices and program/faculty directors should consider the following questions and prepare students accordingly:

1. Are students on the program following special diets to maintain their health? How will this diet be maintained in the foreign country?
2. Do any students have special nutritional needs? How will students fulfill these nutritional needs while overseas?
3. What are the basic staples of the foreign diet?
4. Is the host country diet deficient in any nutrients?
5. Are unsanitary food preparation or storage practices prevalent in the foreign country?
6. Is the water fluorinated, chlorinated, or does it need to be treated before it can be consumed?
7. What kind of water is recommended for drinking?

### MENTAL HEALTH ISSUES

Travel and the process of adapting to a foreign culture are inherently stressful. Initially the stress may be positive since new situations are often perceived as thrilling, adventurous, and fun. Over time, however, the newness dissipates. As people continue to respond to their changing environment, they do so by using acquired socialization processes and skills. Unfortunately, these familiar behaviors may fail to achieve desired outcomes. Consequently, people may feel fatigue, irritation, anger, frustration, and unhappiness. For most people, these feelings are temporary. Eventually they discover and accept new social solutions and support systems that help them successfully cope with their new environment. Others, unfortunately, react to change in maladaptive ways.

#### ***Stress and Culture Shock***

Program/faculty directors should be aware of the physical manifestations of stress (e.g., headaches, gastrointestinal problems, weakened immune systems, and insomnia), and prepared to help students handle the stress that often accompanies change and may lead to culture shock. To support students experiencing stress, directors are encouraged to:

1. exhibit genuine interest in students, and attend to their needs
2. communicate expectations about appropriate behavior
3. provide effective role models

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For a more detailed discussion on dealing with stress abroad, consult the SAFETI (Safety Abroad First Educational Travel Information, <http://www.globaled.us/safeti>) Clearinghouse's adaptation of Peace Corps resources. See also <http://www.globaled.us/peacecorps> for more information.

### ***Mental Illness***

As societal stress levels have risen, so has the number of students with mental health disorders (e.g., clinical depression, anxiety disorders, eating disorders, and post-traumatic stress disorder). Because study abroad programs are microcosms of society and the campus, some program participants may have mental health disorders. Unfortunately, students may not be forthcoming about their disorders prior to departure. Study abroad programs and their administrators have an ethical and legal responsibility (as mandated by the Americans with Disability Act) to provide treatment and support for students with such disorders. Be sure that any insurance coverage selected includes treatment options for mental health (see specifics on Insurance later in this chapter).

This does not mean that study abroad professionals should become mental health experts. Consult the institutional counseling center or health clinic for assistance in developing and selecting appropriate services abroad for students who may have mental illness issues on-site. Most study abroad insurance providers have a referral service or materials about mental health issues as they specifically relate to overseas study and may be able to refer you to competent professionals abroad. Remember that other cultures often have different taboos, norms, and treatment methods for dealing with mental health conditions. Knowledge and understanding of these issues should be part of pre-departure preparation for the program/faculty director.

### **SUBSTANCE ABUSE**

Some college students use and abuse alcohol and other controlled substances as a means of escaping the day-to-day demands of college life. Unfortunately, when such behavior violates host country norms and laws, disrupts the educational process, or threatens the welfare of the abuser or others, the abuse becomes a problem for the program/faculty director and study abroad office to resolve. Students should be cautioned about differences in customs and laws between the U.S. and the host country and the penalties for violating foreign alcohol and drug laws. Study abroad offices and program/faculty directors may want to have students sign a drug/alcohol policy statement. Samples of such documents are included at the end of this chapter.

### **PERSONAL CONDUCT AND ATTITUDES**

Some students have unrealistic expectations and attitudes about living abroad. They may think the foreign country is safer (or more dangerous) than it really is. When away from home and their peer group, students may be more inclined to experiment with behaviors they would normally avoid. They may perceive the foreign environment as more restrictive or liberal in relation to individual freedoms and rights. Regardless of their perceptions, students will need assistance in confronting stereotypes and misconceptions, and replacing misinformation with accurate knowledge about customs and norms of the host culture. Here again, pre-departure orientations and preparation can serve to prevent

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students from misbehaving or putting themselves in compromising or dangerous situations.

### BRIEFING STUDENTS ON HEALTH AND SAFETY ISSUES

Written materials, pre-departure orientations, and in-country orientations are the most common means of discussing health and safety issues with students. Students will need written information to refer to later so it is a good idea to develop a handbook or other written materials. More information on orientations and a comprehensive list of orientation topics can be found in Chapter 7 of this handbook and in the resource materials. Briefing materials should, at a minimum, address the following issues:

1. common adjustment issues, jet lag, culture shock, homesickness, loneliness, and changes in routine
2. customs, laws, and penalties in the host country regarding alcohol and drug abuse and how they differ from those in the U.S.
3. transmission, prevention, and treatment for various diseases endemic to the region (dysentery, hepatitis, malaria, AIDS, etc.)
4. preventative measures (dental and physical check-ups before departure, extra eyeglasses or contact lenses, copies of all prescriptions and the generic name of each)
5. emergency contacts and procedures
6. contact numbers for English-speaking medical and mental health professionals
7. the foreign equivalent of 911 and contact information for ambulance, emergency room, police station, and fire dispatchers
8. information on nutrition
9. information for disabled individuals or individuals with temporary disabilities
10. policies related to insurance
11. region-specific health information
12. region-specific crime and unrest information
13. tips for avoiding unrest, terrorism, and acts of criminal activity.

### INSURANCE AND LIABILITY ISSUES

The types of insurance pertinent to study abroad include:

- sickness and accident insurance for students and employees of the program
- professional liability insurance
- trip cancellation insurance
- travel insurance
- liability insurance carried by independent contractors involved with your program
- insurance for medical evacuation and repatriation of remains

#### Health Insurance Coverage For Participants

It is imperative that students carry adequate health insurance coverage while abroad. A health policy should cover treatment for accidents, illness (including mental health illness), hospitalization, and medical emergencies. Students should also have a policy that

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covers emergency medical evacuation and repatriation of remains. Participants should be reminded that they should have insurance coverage for the periods before, during and after the program when they may be traveling without the group. This may mean that students will need to purchase additional coverage.

Students whose insurance policies are with health maintenance organizations (HMOs) may not have access to insurance benefits while overseas. Basic student medical insurance is insufficient protection for programs and sponsoring institutions.

Students must know the exclusions, benefits, and limitations of their insurance policy and should understand the claims submission process. They should be aware of the effects of pre-existing condition clauses and discuss this with carriers before purchasing a policy. In addition, a condition incurred abroad might not be covered upon their return to the U.S. These possibilities should be outlined by the program/faculty director or study abroad office during orientation sessions, and the student should make appropriate inquiries with insurance providers about such exclusions or policy limitations.

The USG has negotiated a study abroad insurance plan which is available to all USG study abroad participants at a pre-determined price. Cultural Insurance Service International (CISI) is the current contracted provider for study abroad participants (students and faculty/staff while on the program) . The CISI policy has been approved and endorsed by the System Council for International Education and is the recommended provider for the University System of Georgia. For information about the current policy, go to [http://www.usg.edu/oie/study\\_abroad/resources/health\\_safety.phtml](http://www.usg.edu/oie/study_abroad/resources/health_safety.phtml)

### Health Insurance For Program Staff/Employees

Program/faculty directors and study abroad program staff should maintain their own health insurance coverage. Check with your institution's staff benefits/risk management office to determine whether any existing faculty/staff plan will cover medical treatment overseas, repatriation, and emergency evacuation. If your health plan does not include repatriation and emergency evacuation, determine whether workman's compensation insurance provides these services or consider the purchase of a supplemental policy.

In addition, the CISI insurance mentioned previously is available to faculty/staff for purchase.

### Personal/Professional Liability Issues

Depending on the individual circumstances and facts of a case, employees of the University System of Georgia are generally covered by the Board of Regents of the University System of Georgia's liability insurance policy, assuming the employees are acting within the scope of their employment.

Because the facts of individual legal liability cases vary widely and because the Board of Regents' policy might include certain exclusions, program/faculty directors might consider obtaining a separate liability insurance policy that would cover them while they are involved with an overseas program. Professional associations can provide information

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about liability insurance, and may offer personal liability plans to their members at reasonable costs. Also, consult attorneys as well as risk management and liability insurance experts at your campus or at the Board of Regents if there are specific questions.

### Trip Cancellation and Travel Insurance

Trip cancellation insurance can be purchased through travel agents and will provide protection in the event that the trip must be canceled. Note that any trip cancellation insurance arranged by the program director for the program itself might not apply to individual participants. Students can purchase trip cancellation insurance for themselves should unforeseeable circumstances bar them from participating in or completing the program.

Students and staff may also purchase travel insurance for lost baggage and other travel assistance services. Determining whether the insurance benefits outweigh the cost is a matter of individual preference, as this coverage may exclude an extensive list of items.

### Liability Insurance of Independent Contractors

If programs enter into agreements with independent contractors to provide services, they should be advised that these parties will not be covered by an institution's or the Regents' liability insurance policy. These agencies and organizations, however, may have their own liability insurance to handle unforeseen interruptions in service, accidents, negligence, or cancellations. Therefore, contact risk management officials at your campus and campus attorneys to discuss the merits and issues related to third parties and their liability insurance plans. Program organizers should do this before entering into agreements with independent contractors.

## **EMERGENCY RESPONSE PLANNING AND PROTOCOL**

### Real And Perceived Emergencies

Program directors and study abroad offices must be prepared to handle both real and perceived emergencies, as both can be threats to a study abroad program. A real emergency is a genuine or an immediate threat to students or staff, while a perceived emergency is a potentially risky situation that poses no immediate threat.

Examples of real emergencies:

- political coup
- civil unrest
- natural/manmade disaster
- physical/emotional illness
- kidnapping

Examples of perceived emergencies:

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- sensationalized reporting of an event abroad
- distortion of information provided by a participant

Both types of emergencies can affect students, faculty, staff, family members and others in the US and should be treated seriously and responded to in a timely manner.

### Emergency Management in Study Abroad

To prepare for potential problems and to respond to incidents as they happen, institutions should designate individuals and offices which would be called upon to act. Institutions may rely on their Institutional Study Abroad Committee or have a subcommittee designed to deal with any emergencies that arise in conjunction with study abroad programs. Teams may vary according to individual situations and institutional resources, but should include a subset of individuals from the following offices:

#### Study Abroad Office

Dean of Students

Public Safety/Campus Police Office

Counseling Office

Institutional Legal Counsel

University Communications/Public Relations

Provost's Office

This team should also be charged with developing response plans for potential situations, taking into account cultural and political considerations, legal issues, and available resources. It should also determine a communication method and/or initial protocol for contacting individuals and/or convening a meeting in the event of an emergency.

### Emergency Response Plan (ERP)

Although no single plan can address all types of emergencies that might occur during a study abroad program, it is important to establish, in advance, consistent and predictable policies and procedures designed to safeguard the welfare of participants and an institution. Emergency procedures need to be identified and followed in order to assist staff and faculty in reacting in a responsible and considered manner when emergencies do arise.

Having an ERP helps eliminate the chaos that often surrounds any type of incident. Planning allows institutions to establish clear communication channels to address crisis situations. Such plans can provide a legal basis for institutional and individual actions in an emergency situation.

An ERP provides the institution with the “who, what, when, where and how” needed to handle situations that require notification, consultation, and action. It is important to remember that ready availability of information is crucial to the proper execution of an ERP. A generic plan will assist those involved in responding appropriately on a case by case basis, both on site and on campus.



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It is wise to have materials that are available to all parties so that information and protocol can be referenced easily and quickly. This material should be in the form of a handbook and/or available electronically.

In general, in the event of an emergency or crisis abroad, the program/faculty director or other staff person on site should notify the home institution immediately and the initial contact person at the home campus needs to be designated in the ERP. Often times, that first contact is the university or college police or public safety office. The campus police or public safety office will then refer to a designated list of individuals who need to be contacted in succession. The campus police should make every effort to obtain as much information during the initial conversation. In some cases, the study abroad office may want to provide the police office with a script including questions that should be asked of the caller. Those individuals will then determine who from their respective staffs need to be notified.

A basic outline of an ERP might look like this:

Phase 1 – Emergency is reported. Involve members of the Institutional Study Abroad Committee or emergency sub-committee.

Phase 2 – Determine whether the emergency is real or perceived. Gather as much information as possible from individuals on-site, contact or investigate sources for detailed and accurate information.

Phase 3 – Take action as warranted and according to any established action plan.

Phase 4 – Record the chronological sequence of events in writing leading up to, during, and after the crisis. Maintain good records, including an Incident Report for future reference. A sample of an Incident Report is included at the end of this chapter.

Phase 5 – De-brief with all involved individuals. Make changes to emergency protocol where warranted.

Sample ERP documents are provided at the end of this chapter to help guide international educators in asking questions about the following in case of an emergency:

- Initial information to collect
- Specific information to obtain regarding names, times, places and witnesses
- Specific contact information for future communication or reference
- Double checking facts
- Executing an action plan
- Post-crisis follow-up

### Civil Unrest and Political Disturbances

Political and social unrest as well as terrorism are part of our modern world. In general, students should be advised on ways to minimize risk and avoid dangers related to such issues. This may mean giving advice on travel, dress, behavior, avoidance of places that cater to Americans, and avoidance of mass demonstrations. Should a specific threat be

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received, emergency procedures should be implemented immediately. Students should be trained in emergency procedures before it becomes necessary to use them.

### Additional Pre-Departure Preparations

There are a number of steps that study abroad offices and program/faculty directors can take to prepare for dealing with crisis situations on study abroad programs. In addition to conducting thorough pre-departure and on-site orientations for students, faculty, and staff, designing an ERP, and providing students with emergency information, study abroad programs and directors should do the following in preparation for sending students overseas:

- Contact the U.S. embassy or consulate nearest the program site. Alert them to the presence of program participants and staff. Confirm that all participants on the program are registered with the US embassy. For details on the registration process, see: [http://travel.state.gov/travel/tips/registration/registration\\_1186.html](http://travel.state.gov/travel/tips/registration/registration_1186.html)
- Be familiar with calling procedures from the host country.
- Know the foreign country's toll-free numbers for connecting to a U.S. operator.
- Maintain a listing of the daytime and emergency numbers for the U.S. embassy/consulate, Red Cross, Peace Corps, and other study abroad programs in the area.
- Maintain a listing of local numbers for fire, police, ambulance services, hospitals, medical professionals, and insurance companies.
- Regularly update all contact and resource information and place it in an easily accessible location known by all program staff. Keep a copy of the information accessible at all times.

### Study Abroad Security Issues and the US State Department

The U.S. Department of State website is an invaluable source of information for those planning study abroad programs. The main Internet site is at <http://www.state.gov> and the site specific to Consular Affairs is <http://travel.state.gov>. Some of the most important information to be found on these websites includes:

1. **U.S. Department of State Country Specific Information Sheets** which are available for every country of the world and which contain entry requirements, currency regulations, unusual health conditions, crime and security statistics and special situations, political atmosphere and areas of instability and drug penalties, among other things. These information sheets also provide addresses and emergency telephone numbers for U.S. embassies and consulates. This website is: [http://travel.state.gov/travel/cis\\_pa\\_tw/cis/cis\\_1765.html](http://travel.state.gov/travel/cis_pa_tw/cis/cis_1765.html)
2. **U.S. Department of State Travel Warnings and Travel Alerts** are another means of securing information about terrorist threats and other short term and or transnational conditions posing risks to the security of travelers. Announcements are issued when there is a perceived threat. This website can be found at:

[http://travel.state.gov/travel/cis\\_pa\\_tw/tw/tw\\_1764.html](http://travel.state.gov/travel/cis_pa_tw/tw/tw_1764.html) for the travel warnings and at [http://travel.state.gov/travel/cis\\_pa\\_tw/pa/pa\\_1766.html](http://travel.state.gov/travel/cis_pa_tw/pa/pa_1766.html) for the travel alerts.

**Travel Warnings** are issued to describe long-term, protracted conditions that make a country dangerous or unstable. A Travel Warning is also issued when the U.S. Government's ability to assist American citizens is constrained due to the closure of an embassy or consulate or because of a drawdown of its staff.

**Travel Alerts** are issued to disseminate information about short-term conditions, generally within a particular country, that pose imminent risks to the security of U.S. citizens. Natural disasters, terrorist attacks, coups, anniversaries of terrorist events, election-related demonstrations or violence, and high-profile events such as international conferences or regional sports events are examples of conditions that might generate a Travel Alert.

Institutions should develop policies concerning the establishment and running of study abroad programs in countries which have travel warnings and travel alerts.

3. Another good source of information from the U.S. Department of State is the **International Travel Safety Information for Students** at: [http://travel.state.gov/travel/cis\\_pa\\_tw/safety/safety\\_2836.html](http://travel.state.gov/travel/cis_pa_tw/safety/safety_2836.html)  
While this information is provided for travel in general it has some good tips and ideas concerning any type of experience in a foreign destination.
4. Institutions may want to refer and subscribe to **OSAC, the Overseas Security Advisory Council**. (OSAC) is a Federal Advisory Committee with a U.S. Government Charter to promote security cooperation between American business and private sector interests worldwide and the U.S. Department of State. OSAC provides, among other services, regular updates on security issues around the world. To register for updates or to review their services, the website is <https://www.osac.gov/>.
5. The U.S. Department of State has a website devoted exclusively to students' safety abroad. This campaign is a public affairs initiative which targets American college students and young people studying and traveling internationally and is designed to promote safe, smart travel to college students and spring-breakers. It includes a website, flyers called "go! guides," and posters for on-campus and individual use. The website for this program is [www.studentsabroad.state.gov](http://www.studentsabroad.state.gov)

#### Suspending or Cancelling a Program

In the event of a terrorist attack or other event which jeopardizes the health and safety of program participants, it may be necessary that a program be cancelled. If appropriate and feasible, moving the group to a different site might be an alternative to cancellation. The

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decision will be made by the study abroad administrators in consultation with on-site program/faculty directors, university officials at partner institutions, institutional or BOR legal counsel, and ERT members. Efforts should be made to ensure that students in a crisis situation not be unduly penalized either academically or financially.

If program cancellation occurs before or soon after the program begins, every effort should be made to refund recoverable costs to the participants. If the emergency occurs toward the middle or end of the program, it may be best to evacuate the group back to the US but to make arrangements to continue the coursework through a form of independent study, rather than cancel the program altogether.

If a program is not cancelled but an individual student feels uncomfortable about going or remaining abroad as a result of terrorist attack or other incident on location, he/she should be allowed to withdraw. Again, arrangements to return recoverable costs and complete academic work should be pursued.

1. [Responsible Study Abroad](#)
2. [Agreement and Waiver](#)
3. [Application Template with Authorization](#)
4. [Assumption of Risk and Release Form](#)
5. [Physician's Form](#)
- 5a. [Physician's Certificate Form](#)
6. [Student Liability Waiver](#)
7. [Emergency Contact Forms](#)
8. [Expectations for UGA Study Abroad Directors](#)
9. [Student Orientation Checklist](#)
10. [Faculty Orientation Checklist](#)
11. [Alcohol Policy Clarification for Student Abroad](#)
12. [Alcohol and Drug Policy](#)
13. [Acknowledgement of Alcohol and Drug Policies](#)
14. [Emergency Response Protocol](#)
15. [Crisis Response Checklist](#)
16. [GT SA Emergency Response Plan](#)
17. [Incident Report](#)

## **Chapter 6**

### **Site Logistics**

- I. SITE VISITS**
- II. ACCOMMODATIONS**
- III. PROGRAM MEAL PLANS**
- IV. EXCURSIONS**

### **I. SITE VISITS**

The program development visit is a key element needed to plan a study abroad program. Faculty members and program directors should typically make more than one visit to the study abroad site when developing a new program. Initial contact visits may be made when faculty members are near the site for another purpose, such as to conduct research or attend a conference. It is important to determine how site visits will be funded. Program development visits are sometimes funded by the sponsoring department, college, or institution. Some programs will charge student participants an administrative fee to help finance site visits. Be sure to request necessary modifications to your schedule (i.e. course release time or coverage for classes during your absence from campus) in order to have sufficient time to conduct site visits.

#### **PLANNING THE SITE VISIT**

Program directors must consider several factors when arranging a site visit:

- Timing - the timing of this visit should be carefully planned to coincide with dates that the foreign institution is in session in order to collect syllabi, inspect facilities, or observe classes.
- Previous experience in the region - In many cases, it is advisable that faculty members have prior experience with the host country or in conducting site visits in overseas locations.
- Multiple visits - Often, trying to gather all the necessary information in one visit can be daunting, if not impractical, so program directors may wish to plan to make more than one visit as needed.
- Making contact with foreign institutions - There is no formula for an initial contact with a foreign institution or organization. The nuances and culture of the host country and the foreign institution will dictate the approach a potential program director should use when making initial contact visits.
- Be as thorough as possible - Bear in mind that thorough site visits provide information which can ultimately make the program director's job easier. While on site, program directors should gather information to facilitate administrative planning and explore the locale. It is a good idea to utilize a checklist of items which need to be researched and considered while on a site visit.

## **CONSIDERATIONS DURING THE VISIT**

### *Making Contacts in the Host Country:*

- Establish clear communication with a counterpart at the institution or academic site prior to arrival.
- Prior to departure, devise a schedule to meet with appropriate faculty, student services personnel, current participants, and host families, and set up visits to tour facilities such as dormitories, classrooms, etc.
- If possible, meet with a program director of another program currently in session at the site.
- Selects gifts appropriate for individuals in the host country whom you will meet.
- When appropriate, cultivate relationships with key representatives in city government and civic organizations. Good relationships with local governments can sometimes produce unexpected, interesting, and memorable program enhancements.
- Establish contact with the nearby U.S. embassy or consulate, and request from the embassy a list of local English-speaking doctors and lawyers.
- Meet with corporate representatives if your program plans to include internships.
- Meet with local travel agencies or other in-country resource personnel.
- Meet with any third-party service providers you may wish to use during the course of your program.

### *Administrative Planning:*

- Collect syllabi or course descriptions and observe classes at the host institution.
- Take a library tour and review appropriate holdings and resources.
- Collect samples of any important documents or forms, including insurance forms, student forms, and academic forms that students will be required to complete.
- Tour the classroom facilities and examine the equipment that will be available and how the use of these facilities is arranged. Make arrangements for space that will serve as a base for the program. Determine computer access, including email access and Internet access, and clarify usage policies for faculty and students.
- Inspect the housing accommodations that will be available to students and faculty. Determine any restrictions on the number or type of students that can be accommodated.
- Inquire about linen services and laundry facilities, meal options, student ID cards, exercise or sports facilities, and communication access at the housing site.
- Explore meal options and make arrangements for meal plans.

### *Exploring the Locale:*

- Learn as much of the local area as possible.
- Review local transportation services and plan for any needed transportation upon arrival.
- Explore possibilities for field trip/excursion opportunities.

- Determine the amount of time required for every stage of travel.
- Obtain tourism booklets, city maps, and transit information to give students.
- Locate post offices and inquire about services offered and prices of postage.
- Determine how students will use local telephones, cybercafés, and place calls to the U.S.
- Take note of the costs of food, clothing, entertainment, and public transportation (trains, subways, taxis, and buses).
- Familiarize yourself with the local emergency facilities and services, including medical clinics, hospitals, and police.
- Locate nearby markets, grocery stores, and drug stores.
- Sample food served in local restaurants as well as the host institution's cafeteria meal plan options.
- Determine whether your program will be considered an association that may require special registration, and whether registration with local law enforcement is necessary.
- Become familiar with the local money exchange and banking procedures (i.e. ATM, credit card advances).
- Take extensive photographs/video footage for publicity brochures and orientation purposes.
- Ask local students how they spend their free time.
- Determine how American visitors are received by the locals - and why.
- Take particular note of cultural norms related to gender, race, sexual orientation, and disability.
- Examine safety and security issues in the area and determine unsafe regions or neighborhoods.

## **FOLLOW-UP VISITS**

It is good practice for programs to be evaluated annually; in fact, it is becoming more common for evaluation of international study programs to be included as part of accreditation reviews. Often, the follow-up site visit can help resolve questions or uncover weaknesses of the program. At the conclusion of the review, an official report of findings should be produced. The follow-up site visit may be funded by program fees, the institution, or, if applicable, by the interested accrediting body.

The purpose of the follow-up visit is to determine whether the program's objectives and the students' interests will be met. The strengths and weaknesses of the program should be described. Budgets and financial procedures should be reviewed. The relationships between institutions and organizations should be a subject of this review as should each of the elements of the program, including the following:

- admissions criteria
- enrollment
- orientation
- integration of the program with the host community and foreign culture
- selection of faculty, methods of student instruction, and student achievement

## **FAMILIARIZATION TOURS**

Inspection tours are arranged by third-party organizations as a means to promote their programs of study. Inspection tours can also be of interest to administrators who send students on third-party programs but lack first-hand knowledge of the program sites. Commonly, the organization will partially fund the visit, thus reducing the institutional or departmental funding required.

Inspection tours are organized by the on-site director. Meetings with various administrators and faculty will be combined with discussions with current participants. Daily excursions will be scheduled and all accommodations and transportation will be arranged by the organization.

There are two drawbacks to inspection tours:

- 1) The program director does not gain the hands-on experience of making his or her own arrangements.
- 2) There is very little free time for independent activities or for exploring the local area.

## **II. ACCOMMODATIONS**

In securing student accommodations, consider the following:

- housing options available at the overseas site
- logistics of housing arrangements
- housing allocation and availability
- post-program housing evaluation procedures
- the procedure for addressing complaints
- special arrangements that need to be made for certain students

### **TYPES OF ACCOMMODATIONS**

Before looking at accommodations, determine the approximate number of rooms or homestay placements needed before you begin to look for accommodations. Be sure to take into account the gender of participants.

#### **Dormitories**

Dormitory space is most often available during the summer when most local students are off-campus, but rooms may also be available on a limited basis for study abroad/exchange students throughout the year.

*Advantage:*

- American students may live among host national students.

*Consider:*

- Residence facilities with either student cafeterias or self-catering cooking facilities for residents are preferred as they help students cut down on costs.



- Availability of laundry facilities, computer labs, gym/exercise facilities, phone/computer access, and a linens service is important in making decisions regarding student housing in residence halls.

### **Homestays**

Some programs arrange homestays in which students have single or shared bedrooms and typically are served one or two meals each day. The kind of family with which the participants are placed varies. Families may not be “typical” families and may in fact be single hosts or childless couples.

*Advantage:*

- Homestays are generally less expensive than dormitory, hotel, or apartment living.
- Host families may offer program participants a more intimate cultural experience and, where applicable, a language immersion setting.

*Consider:*

- Students will need to follow family guidelines and respect smoking policies, curfews, limits on the use of electricity, hot water, the telephone, Internet, etc.
- Living with a host family does not guarantee that the student will be included in family activities.
- Family and student expectations should be clearly outlined before the program begins.

### **Apartments**

*Advantage:*

- Apartments allow students a great deal of freedom and usually include cooking and laundry facilities.

*Consider:*

- There may be other costs associated with apartment living such as security deposits or utilities.
- Students renting overseas apartments often have American roommates; therefore, the opportunity to interact with host-country nationals is limited.
- Finding apartments for students may prove to be difficult, especially if the duration of the study abroad program is short.

### **Hotels or Pensions**

*Advantage:*

- Students have freedom in selecting their room accommodations (single, double, triple), and often a meal or food service is available.

*Consider:*

- The quality of the hotel or hostel available may differ significantly from US standards.
- The number of students per room can vary.
- Breakfast or other meals may be included in the cost (common among European pensions).

## **LOCATING ACCOMMODATIONS OVERSEAS**

Some program directors choose to assume sole responsibility for locating housing for program participants (which can be difficult for homestay accommodations). This allows for more control over the type, location, and condition of housing that is used for the program. However, searching for housing on your own requires a large amount of time, an extensive site visit, language proficiency in areas where English may not be spoken, and knowledge of rental policies, regulations, and practices in the host country.

Alternatively, program coordinators may choose to contract with outside placement organizations or institutions that locate appropriate program housing. These services can be provided by an overseas university or for-profit housing organization. If your program is being administered in conjunction with a study abroad organization, the organization may secure housing for you. Choosing a reputable placement organization is crucial, and it is necessary to inspect the accommodations before signing the contract.

Whether the program director is securing housing or contracting with an organization, it is imperative that the housing be in a safe neighborhood, relatively close to the educational facilities, in good repair, and near local transportation.

*Elements to consider in evaluation of housing:*

- availability of laundry services
- availability of computers, Internet access, and phones
- availability of exercise or sports facilities
- meal plans or food service options

It is important for the program director to be easily accessible to all students, especially if students are housed in various accommodations throughout the area and not centrally located near the program director's accommodations. In some cases, participants must sign individual housing contracts for apartments or residence halls.

## **PLACING STUDENTS IN ACCOMODATIONS**

Housing questionnaires are a useful way to match students with their housing preferences and can be beneficial for homestay arrangements or housing with roommates in dormitories, hotels, pensions, or apartments. Using this type of questionnaire may help cut down on the number of participants who request a change in housing once they are overseas.

Offering an array of housing options can make a study abroad program attractive to a larger number of students. For example, an older student may not want to share a dorm room or apartment with a large group of younger students. Some students are attracted to the benefits of a living with host families, while others may want the freedom of having their own room or apartment. For some study abroad programs, offering a variety of accommodations to

students is a necessity as there may not be enough available space from a single source to house all participants. On the other hand, locating different types of housing can be time-consuming and difficult. If the program is offering several housing options, it is important to be honest and up-front with participants by stating that the program director will try to match all housing requests but that this may not be possible in all cases.

Study abroad program administrators are legally obligated to make reasonable efforts to provide equal opportunities to all program participants. Nevertheless, placing some students can be difficult, and program directors may have difficulty securing housing for students with health conditions and/or dietary restrictions, married students who would like to be accompanied by their spouse and/or children, or students with disabilities. Host families or roommates should be informed ahead of time of any special accommodations that must be made for students. Unfortunately, some students needing special services may fail to disclose the appropriate information to the program director prior to departure but may demand these services once overseas. Policies addressing this possibility must be established and clearly articulated before the program begins.

All information about housing conditions, policies, and expectations should be provided in writing and distributed to students so as to ensure realistic expectations during their stay. Guidelines about roommate or host family conflict resolution and housing reassignment policies should be in place before the program begins. These guidelines should be evaluated by your home institution's legal affairs office. If you are contracting with a placement organization or other institution, you should discuss their reassignment and conflict resolution policies and feel comfortable with these policies before signing the contract. Failure to address problems with overseas living arrangements can result in a negative study abroad experience for program participants.

### **ACCOMMODATION EVALUATIONS**

As part of the post-program evaluation process, students should complete evaluations which include an assessment of accommodations. Evaluations help the program director in determining problems with the accommodations that must be resolved before the next program. Some suggested questions for a housing evaluation are listed below.

- How satisfied were you with your roommate(s) or host family? Why or why not?
- Did you have a single or double room? Did you share with an international, host-country, or American student?
- How satisfied were you with your sleeping quarters?
- Did you have access to adequate kitchen/cooking facilities (if applicable)?
- How satisfied were you with the meal plan provided (if applicable)?
- What was your usual means of transportation to and from class?
- What was the average travel time from your housing to classrooms?
- Did you have adequate laundry facilities?
- Would you recommend your accommodations for future participants? Why or why not?
- Were there any problems with your accommodations that arose? If so, how were they resolved?

### III. PROGRAM MEAL PLANS

Learning about another country's culture includes experiencing the cuisine. Meal plans should take advantage of the host country culture as much as possible while taking into account the program structure and budget. Ideally, there should be a balance between quality, authenticity, affordability, and convenience.

The meal plan you select for your program will be determined by the type of accommodations selected. Host families typically provide students with one or two meals per day. Hotels and pensions rarely provide meals, with the exception of breakfast, and meal options at residence halls will vary. Some dormitories have student cafeterias while others provide facilities where residents can cook their own meals.

#### Cafeteria plan considerations:

- Sample several meals during the site visit.
- Make sure that menus can accommodate special diets.
- Ensure that meal times will not conflict with classes or other scheduled activities.

#### Self-catering apartment considerations:

- Investigate whether apartments or dorms have kitchen facilities equipped with necessary appliances and utensils.
- If participants will be cooking for themselves, determine the proximity of the housing and the availability of transportation to grocery stores/markets, as well as food prices and availability.

#### Housing options when there is neither self-catering nor a cafeteria:

When cooking facilities are not available and meals are not provided, program directors may choose one of the following options:

- 1) Provide one or two meals per day at a local restaurant, and include the cost in the program fee.
  - Be aware that arranging for meals at a local restaurant may be difficult. In order to find a local restaurant willing to provide student meals, plan on spending a great deal of time investigating this option during a site visit.
  - Network with other program directors in the area and talk to faculty at local universities for assistance in identifying suitable restaurants.
- 2) Routinely allocate money from the program budget to each participant to apply to the cost of meals.
  - A realistic per diem must be established based upon the area's cost of living and the options available.

This amount should be included into program costs or clearly stated in the program information materials in order for students to determine their own personal budgets.

- 3) Have students purchase meals using their own money.

- A realistic per diem must be established based upon the area's cost of living and the options available.
- This amount should be included into program costs or clearly stated in the program information materials in order for students to determine their own personal budgets.

Consider the following in deciding on participant meal plans:

- the number of meals per day/number of days per week which should be included in the program fee
- the cost of meals while on program-sponsored excursions
- faculty and staff meals
- whether the cost of the faculty/staff meals will be paid through students' program fees
- whether faculty/staff meal plans will be the same as those provided to students

## **IV. EXCURSIONS**

Worthwhile field trips will make program course work more accessible and interesting to participants. These field trips should be formal, guided learning experiences. They should also provide students with opportunities to conduct independent exploration, immerse themselves in the host country's culture, and apply foreign language skills. Good planning will ensure that excursions are more than mere sight-seeing trips. Excursions should be planned and scheduled during the program development site visit.

You may choose to make all arrangements for excursions or elect to use third parties that will assume responsibility for planning and guiding field experiences. You should discuss the procedures for establishing such agreements with the legal affairs office at your institution before negotiating with contractors since some institutions have strict policies about such matters.

### **EXCURSION COSTS**

It may be appropriate to include the cost of required trips into the overall price of the program fee. Not only will this inform the students that the program will provide more than a classroom experience, but it will also reduce the likelihood that students will elect not to participate in excursions.

*Consider:*

- If transportation is required, make arrangements during the program development site visit.
- Try to make travel arrangements that will accommodate only your program's participants instead of combining your group with others.

If the number of participants is large, or the curriculum is very diverse, then a variety of excursions from which students can select may be appropriate. Some programs provide several excursion options with the requirement that students visit a certain number of sites. Students may pay for these trips as part of their program fee, or students can pay for excursions on-site.

## **EXCURSIONS AND ACADEMIC ISSUES**

Accommodating both the need for cultural immersion and the required number of class contact hours takes some creative scheduling. It is good practice to make the excursions a required part of course work to ensure that students will take full advantage of those experiences. It is not uncommon for program directors to schedule longer class times during the week in order to accommodate a weekend excursion. Deadlines and expectations for assignments regarding field trips - whether these assignments are journals, reports, or major papers - should be clearly explained to students and included in the course syllabus. Well planned and pertinent excursions should provide a unique opportunity for students to incorporate their cultural experiences into their academic work.

## **CONSIDERATIONS IN DEVELOPING EXCURSIONS**

Begin planning for excursions during site visits. Suggested planning activities include the following:

- Gather information brochures and a calendar of local events.
- Consider the possibility of planning uncommon excursions that are not directed toward tourists.
- Define the underlying purpose for selecting a particular excursion. Why are you selecting a particular museum, site of interest, etc.? If, for example, you intend for students to visit a local market to learn about local commerce rather than just buy gifts, then that purpose should be clearly stated before the excursion.
- Determine the number of faculty members who will need to be present throughout the excursion.
- Decide whether the field trip requires structured organization. Is it necessary to organize transportation, accommodations, and/or meals for the students?
- Determine the provider for transportation, accommodations, and food services, and when payments for these services will be required.
- Consider whether participants' program fees should include train passes, bus tickets, entrance fees, etc., for excursions.
- Discuss service providers with the local institutional contact to determine whether the institution can provide these services.
- Check to see whether any additional insurance must be purchased to cover excursions.
- Decide if an additional orientation for a particular field trip will be necessary.
- Make sure that the meeting places, times, and itinerary of the excursion are clearly communicated to participants.
- Be certain that any necessary release forms have been received from all participants.
- Develop a contingency plan to account for variations or substitutions to the itinerary.
- Establish procedures to communicate with the home campus if there are changes in your emergency contact information.
- If an excursion is made to a remote location, determine how emergencies will be handled.
- Determine whether students will be allowed to participate on substitute excursions.



# **Chapter 7**

## **Pre-Departure and Re-Entry for Study Abroad Programs**

- I. PASSPORTS, VISAS, AND OTHER TRAVEL DOCUMENTS
- II. TRAVEL ARRANGEMENTS
- III. PRE-DEPARTURE INFORMATION PACKETS
- IV. PROGRAM ORIENTATION
- V. RE-ENTRY AND EVALUATION

### **I. PASSPORTS, VISAS, AND OTHER TRAVEL DOCUMENTS**

#### **TRAVEL DOCUMENTS**

The program director should provide study abroad participants with information on obtaining required travel documents as early as possible. The program director must be familiar with the procedures for obtaining such documents. Once obtained, the program director should keep one set of photocopies of all participants' documents on file in the United States and one set on-site. These copies should be safeguarded according to your institution's regulations regarding confidentiality of student records.

#### **OBTAINING A U.S. PASSPORT**

A passport is required for nearly all study abroad destinations. Participants must have a passport before they can be issued a visa. (An explanation of the student visa can be found on page 82 of this handbook.) Because consulates and embassies may deny a visa application if the participant's passport expires shortly after the program end date, individuals who already have passports must confirm that the expiration date of the passport is at least six months beyond the end date of the study abroad program. To download passport forms and instructions, go to [http://travel.state.gov/passport/passport\\_1738.html](http://travel.state.gov/passport/passport_1738.html).

#### **First-Time Applicants**

First-time passport applicants should follow the detailed instructions provided by the US Department of State: [http://travel.state.gov/passport/get/first/first\\_830.html](http://travel.state.gov/passport/get/first/first_830.html)

#### **Expedited Service**

In addition to regular application fees, a \$60 expedited service fee per application plus overnight delivery costs will apply. Two-way overnight delivery is strongly suggested. Anyone may request expedited service (e.g., first-time applications, renewals, amendments of existing passports, etc.).



## **Renewal of a U.S. Passport**

Applicants may renew their passport by mail if:

- their most recent passport is available
- they received the passport within the past 15 years
- they were over age 16 when it was issued
- they still have the same name, or can legally document a name change\*

Residents abroad should renew their passports at the nearest U.S. embassy or U.S. consulate. Passports renewed by mail in the U.S. can only be forwarded to U.S. addresses. Specific instructions on how to renew a passport can be found at the US Department of State Web site at [http://travel.state.gov/passport/get/renew/renew\\_833.html](http://travel.state.gov/passport/get/renew/renew_833.html).

### **In the event of a travel emergency:**

The National Passport Information Center at 1-877-4USA-PPT (1-877-487-2778) provides automated information 24 hours a day, 7 days a week.

## **OBTAINING A VISA**

The term “visa” is used to describe both an entry stamp as well as any accompanying paperwork that is affixed to or designed to accompany the pages of the participant's passport. Visas indicate the countries to which the passport holder may enter and exit and permit a specified duration and purpose of the passport holder's stay.

Study abroad program participants as well as faculty and staff may be required to obtain a tourist, work, or student visa for programs in certain countries. The type of visa required will depend upon the program site, duration, and purpose. Program directors must be aware of any restrictions on visas that might affect the program. To determine requirements, contact the embassy or consulate of the host country/ies located in the US. The U.S. Department of State provides a listing of overseas embassies and consulates and general entry requirements at [http://travel.state.gov/travel/tips/brochures/brochures\\_1229.html](http://travel.state.gov/travel/tips/brochures/brochures_1229.html).

Timelines and procedures for applying for a visa vary amongst embassies and consulates, and even embassies and consulates within the same country may have different requirements. Some require applicants to present application materials in person while others allow the documents to be mailed but require applicants to pick up the visa in person. It is very important to carefully explain to participants as early as possible the procedures required as well as provide any necessary application materials and Web site links.

Students who are not U.S. citizens may be required to follow different processes to obtain a visa. The program director should also be aware that non-U.S. citizens may be required to gather special documentation which allows them to depart and re-enter the United States. Program directors should verify the citizenship of each participant well in advance of the departure date to allow for extra processing time that may be required for non-U.S. visa applicants.

Work visas are usually required for participants whose study abroad programs include paid internships. Visa regulations associated with working for pay are very restrictive in most countries. Some work or internship program directors may make use of the BUNAC or CIEE work abroad programs. These organizations have arrangements with some foreign governments that allow students to work (for a fee and for a limited amount of time) in select countries. Students who have previously participated in similar work exchange programs and non-U.S. citizens may not be eligible.

**Program directors should do the following regarding visa processes required for their study abroad program:**

- Verify visa requirements, remittance addresses, and the cost of the visa application.
- Check restrictions such as the duration of time visitors may remain in the country and the number of entries they are permitted.
- Confirm processing times, which are unique to each country and always subject to change.
- Remind students of visa requirements (securing a passport, completing application forms, submitting the application fee, making appointments for personal interviews, picking up the visa, etc).
- Inform students who are non-U.S. citizens of any additional requirements.
- Provide Web site links to foreign embassies and consulates located in the US.

#### **USE OF DOCUMENTS WHILE OVERSEAS**

Before departure, directors should advise participants to:

- Carry all travel documents on their person and not pack them in luggage that will be checked on to the plane.
- Carry copies of all travel documents in a location separate from the documents themselves.
- Leave copies of their travel documents at home in the U.S. with a family member, guardian, or friend.

At the port of entry, a customs officer will examine travel documents and will inquire about the visitor's purpose for entering the country. If there are no customs forms to complete, border officials typically stamp the passport to indicate permission to enter the country, and travelers are permitted to collect their baggage and make their way to their destination.

Upon arrival, a hotel or hostel may require guests to leave their passports with the concierge or hotel staff; participants should be informed of this practice in advance. Some countries' laws require non-citizens to carry their passports at all times, so students should be advised accordingly.

The program director should keep copies of all participant passports, visas, and other important travel documents on hand at all times. Theft or loss of a passport can result in long hours or days spent waiting at the U.S. embassy for a new passport to be issued. The importance of knowing the location and phone number of the U.S. embassy (as well as the embassy of any non-U.S. citizen participants) and the importance of keeping photocopies of participants' passports cannot be overemphasized. In certain countries, visitors are encouraged to register at the U.S. embassy upon arrival.

## OTHER TRAVEL DOCUMENTS

Some programs require that students have other documents such as the International Student Identity Card (ISIC), a hostel membership card, and/or train passes. The ISIC provides minimal medical evacuation and repatriation benefits for travelers and is required for participation in certain programs. More information on insurance and ISIC can be found <http://www.isic.org/sisp/index.htm>. Consult a travel agent for more information on how these and other travel documents could be beneficial to your program.

## **II. TRAVEL ARRANGEMENTS**

### *Arranging group travel*

Making group travel arrangements can be time-consuming, but it does have advantages over coordinating separate arrival times of many students. Group travel is the most appropriate when:

- the program consists of ten or more participants
- several of the participants are not experienced travelers
- students will have less flexibility in making arrangements for departure (departure from the U.S. will occur soon after the previous term ends, or the program ends with very little time to spare before the next term begins)
- only a limited number of students plan to travel after the program

### *Advantages of group travel:*

- Coordination of students may be less difficult than coordinating airport transfers for students with different arrival times or arranging for students to meet at an appointed time.
- There is potential for securing cheaper tickets.

### *Disadvantages of group travel:*

- There is an increased risk of liability.
- Organizing group travel may be time consuming and the program director's limited time may be better spent on other matters.
- If the cost of the airline ticket cannot be excluded from the program fee, some students may elect to participate in other programs which do not incorporate the ticket price into the cost.

### **TIPS FOR ORGANIZING GROUP TRAVEL**

- Start planning itineraries with airlines directly or through travel agents or ticket consolidators at least seven months prior to departure. If this is your first time negotiating airline fares, you may need to begin this process earlier. By working directly with an airline's group reservations department, a program director may be able to negotiate ticket prices as low as those quoted by travel agents and will not be charged any additional commission fees. The disadvantage to working directly with an airline is that this process is

more time-consuming than the use of an authorized travel agent.

- Travel agents have very extensive resources and are a convenient option for busy program directors; however, some travel agents will charge fees for their services. Travel agents will be able to assist with flights, airport transfers, hotel accommodations, and ground transportation. They will also be able to provide information about some types of travel insurance coverage. Some travel agents may even be willing to participate in the program's orientation program to give students an overview of what to expect when traveling. Travel agents can often make flight arrangements within a range of dates. If this is the case, students may be able to arrange their own travel by selecting from among several options.
- Contact other USG program directors for names of travel agencies that have worked with study abroad programs in the past.
- In your search for travel agents, consider agents that are located in the host country. In many cases, travel agencies in your destination country can find better deals on ground transportation or domestic travel.
- While using more than one travel agent may result in better prices, the program director must spend more time confirming travel plans, and the services provided may not coordinate as well as if you were using a single agent. Using a single agent for the entire trip will also establish a good business relationship that may be helpful in future years.
- By making flight arrangements through a ticket consolidator (i.e., a discount travel agency or a student travel discounter), a program director can sometimes obtain better rates for a volume ticket purchase than those quoted by a travel agent. Ticket consolidators provide limited information on accommodations and in-country travel services, but any information they supply will always be quoted at budget rates. The drawbacks of using a consolidator include less flexibility in scheduling flights, more stringent payment deadline requirements, and earlier deposit requirements.

**QUESTIONS TO CONSIDER WHEN NEGOTIATING TRAVEL ARRANGEMENTS:**

- Have all the airport and departure taxes, as well as any travel agent booking fees, been included in the quoted price?
- What is the minimum number of passengers required in order to receive a discounted group fare?
- How will the student fare be affected if the enrollment numbers fall short of the minimum number?
- What restrictions apply?
- What is the refund/cancellation policy?
- Are any deviations or changes allowed (e.g., students who stay later for additional travel) and when is the deadline for making these changes?
- Will penalties apply if changes are made?
- Are deposits required?
- What is the deadline for deposits?
- By what date must full payment be received?
- By what date must the names of the passengers be provided?

### **“FREE” TICKETS FOR PROGRAM DIRECTORS**

Many travel agencies will offer an "inspection ticket" for a site visit or will offer a “free” ticket which can be used by the program director. This bonus ticket has actually been included in the agent's calculations for the group price and the price for this ticket has been absorbed by all paying participants. Program directors should be aware of their institution's policy regarding such “free” tickets. In some cases it may not be appropriate to use this ticket. A good alternative is to ask the agent to exclude the bonus ticket from the group purchase price in order to reduce the overall cost for all participants.

## **III. PRE-DEPARTURE INFORMATION PACKETS**

To prepare your students for their overseas experience, you will need to provide pre-departure information packets that complement and expand upon the information provided in your acceptance packets. While information in acceptance packets is primarily focused on the preliminary details of the program, information laid out in the pre-departure packet will be relevant to the specific program site, host country, and region. Participating faculty and staff should also be given a pre-departure packet with information tailored to their specific needs.

### ***WHY DO I NEED TO MAKE PRE-DEPARTURE INFORMATION AVAILABLE?***

- Pre-departure information helps students, faculty, and staff know what to expect during their stay in a foreign country.
- It can ease uncertainties and allows the program director to communicate the risks inherent in study abroad.
- Comprehensive pre-departure information also helps prepare students to cope with the sometimes stressful experience of living overseas.
- It can encourage students to adopt an open, non-judgmental perspective.

The breadth of information included will be determined by the number of staff available to pull together the information, the amount of time available for the orientation, and your target audience. No matter how many resources are available, it will be impossible to include everything, but information should be as complete and accurate as possible. Keep in mind that too much information will be intimidating to readers and may lose its effectiveness.

### ***WHEN AND HOW SHOULD THE PRE-DEPARTURE PACKETS BE DISTRIBUTED?***

Student pre-departure packets should be distributed prior to the pre-departure orientation. This gives students an opportunity to become familiar with the information before it is discussed in detail at the orientation. If some students are unable to attend the orientation, you may want to send their information packets earlier to allow plenty of time for these participants to read through the packet and ask questions via e-mail or phone.

Faculty and staff will need pre-departure information early, perhaps at a program planning meeting or faculty

orientation session. This will provide an opportunity for them to become fully briefed about the program and be well prepared to answer students' questions.

### ***WHAT SHOULD BE INCLUDED IN STUDENT ORIENTATION MATERIALS?***

- Information about obtaining passports, visas, International Student Identity Cards (ISIC), hostel cards, and rail passes, as applicable. While passport and visa information should have been distributed in the program acceptance packets, repeating this information in pre-departure packets is a good idea.
- Information about what and what NOT to pack and how much luggage to bring.
- Information about the availability of and access to computers and e-mail, phones, fax machines, and copiers.
- Academic policies such as class attendance, placement exams, homework requirements, syllabi, available facilities (e.g., computer labs and libraries), required text books, grading systems, and procedures for registration and credit transfer at the home campus upon returning from overseas should be included.
- A description of the students' housing and/or host families along with the overseas address and phone number; the availability of kitchens, lounges, and laundry facilities; the location and availability of phones and computer ports; policies and rules related to accommodations; and their roommate assignment, if applicable.
- Detailed information concerning meals and types of food available is very important. Students should be well-informed about the number of meals provided and the estimated cost of these meals. If students will be cooking for themselves, include information about the location of grocery stores or markets and the availability of kitchen utensils and appliances.
- Information about any excursions that will be a part of the study abroad program and any additional costs associated with the excursions.
- A listing of emergency addresses and phone numbers of campus officials in the U.S. and abroad including names, phone numbers, Web sites, and addresses of host country hospitals; English-speaking doctors, psychiatrists, and dentists; local police, fire, and ambulance services; and the nearest U.S. embassy or consulate.
- Estimated living expenses will give students a basis for developing their own budget. From this information, students can estimate how much money they will need based upon their own spending habits and the local cost of living. *Clearly state that the living expenses are estimated and that some students will spend more or less, depending upon their personal spending habits.*
- Information about the kind of money they should bring and how they can obtain money overseas is essential. Describe the procedure for changing travelers checks or cash into the local currency, using ATM machines, and the availability and location and hours of local banks or exchange kiosks.
- Describe the location, availability, and costs of subways, buses, trolleys, trams, funiculars, trains, and taxis near the program site as well as the types of transportation available for longer travel within the host country and surrounding region.

- Health issues specific to the area, including necessary immunizations, illness prevention, and emergency instructions should be noted. Suggest that students visit a dentist and have a complete physical before departing. Students should discuss their health care needs with their physician before departure and should plan to take sufficient supplies of medications or prescriptions with them (as well as a copy of any prescriptions and the generic name for each. Encourage students to inform you of any special medical requirements so that you can advise them about the kinds of services they can expect in the foreign setting.
- A copy of the State Department's Consular Information Sheet and any travel advisories so students will have an overview of the political climate and safety level of the host country. This information can be found at [http://travel.state.gov/travel/cis\\_pa\\_tw/tw/tw\\_1764.html](http://travel.state.gov/travel/cis_pa_tw/tw/tw_1764.html).
- Information about differences in the host country's laws and customs which vary significantly from those of the United States is also essential. *Be sure to provide a clear statement that U.S. federal laws are usually not applicable to U.S. visitors in a host country and that many infractions carry much more severe penalties than they do in the U.S.*
- Information about cultural considerations relating to women, minorities, disabled students, and gay and lesbian students overseas is also important. Students should be made aware of how locals might react towards them.
- Detailed information regarding all aspects of the host country and culture, culture shock, and what to expect when returning from overseas is important. A suggested reading list about the host country or region will help to further prepare students.
- Information about any institutional policies which may affect participants once they return to campus, including registration, housing and financial aid requirements, should be included. Directors should inform participants accordingly and should do as much as possible to provide the necessary forms or phone numbers related to campus policies and procedures.

***WHAT SHOULD BE INCLUDED IN THE INFORMATION PROVIDED TO SPOUSES/PARENTS/GUARDIANS?***

In some cases, it is appropriate to give students' spouses or family members a pre-departure packet. However, *packets should never be sent directly to family members unless the students have given written authorization to do so.*

Family packets may include:

- basic program information
- methods of communication
- emergency contact phone numbers and addresses, including information on contacting the program director in the U.S. and while abroad
- a reminder that it is not always possible for program participants to call home at a prescribed date and time and that a missed phone call does not constitute an emergency
- information about culture shock and homesickness, and how program participants may change from the experience, to help family members understand the various emotional and developmental stages

participants will experience while overseas

- information about re-entry culture shock
- any institutional policies which may affect participants once they return to campus including registration, housing and financial aid requirements, as well as any necessary forms or phone numbers related to campus policies and procedures

### ***WHAT SHOULD BE INCLUDED IN THE FACULTY/STAFF PACKETS?***

Faculty/staff packets should include all information given to students and families plus the following information:

- **Listings of emergency addresses and phone numbers**

Like students, faculty/staff will need names, phone numbers, and addresses of host country hospitals; and clinics; locations and hours of pharmacies; a list of approved English-speaking doctors, psychiatrists, dentists; local police, fire, and ambulance services; and the nearest U.S. embassy or consulate. A listing of campus officials in the U.S. and abroad is also recommended.

- **University-approved emergency policies and procedures**

It is important that faculty and staff familiarize themselves with and understand emergency protocol procedures that are in place and be able to respond appropriately should the need arise.

- **Guidelines regarding academic issues**

These guidelines should include program requirements, exam and assignment policies, grading policies, attendance requirements, add/drop policies, class and faculty evaluation procedures, and final grade submission deadlines.

- **Types of equipment available**

Faculty should be informed of access they will have to fax machines, copy machines, computers, phones, audio-visual equipment, television/VCRs, etc., so that they may plan their courses appropriately.

- **Accommodations**

The location and type of housing provided for the faculty/staff should be clearly described, as well as the local transportation options available.

- **Excursions or field trips**

Provide trip details including the location, accommodations (if applicable), transportation arrangements, and any meals provided while on the trip. Faculty and staff should be fully aware of all responsibilities they may have involving excursions.

- **Cross-cultural adaptations and cultural shock**

Furnish information about the developmental processes that students will experience while overseas, including cross-cultural adaptation and cultural shock, to assist faculty and staff in helping students who are adapting to new surroundings.

You may have additional ideas that would be helpful or enjoyable for students and faculty/ staff, such as a calendar of upcoming events in the host country, suggested weekend trips, time and location of various church services, sports



and recreational events, etc. These packets should include as much information as will be relevant and helpful in preparing for a program abroad.

## **IV. PRE-DEPARTURE PROGRAM ORIENTATION**

A comprehensive pre-departure orientation program is crucial to a successful study abroad program and will help ensure that participants have the necessary information and cross-cultural training to ensure a successful study abroad experience. An effective orientation should provide essential program information, including all logistical and academic elements; motivate students to learn about the host culture; and help students to develop cross-cultural sensitivity and cross-cultural adaptation. Generally, the more information students receive before their departure, the smoother their adjustment process overseas.

Ideally, the pre-departure orientation should be conducted by the faculty and staff directly responsible for conducting the program. If possible, prior participants should also be involved. Including international students and scholars from the host country can offer valuable information and insight about the study abroad destination. It may also be a good idea to invite faculty or staff with cross-cultural expertise to address cross-cultural communication issues. It is important that the role and content of each presenter be clearly defined in advance to avoid redundancy and to ensure that all critical issues are adequately covered.

A good orientation program will present the information in a variety of ways, utilizing different audio-visual aids such as slides, transparencies, Power Point presentations, and videos. When there is more time available, cultural role-play exercises can be invaluable in bringing to life cultural adjustment issues. The orientation is vital to the success of students' study abroad experience, and therefore every effort should be made to make the program as interesting and relevant as possible. Because much valuable information will be provided during the orientation in a relatively short period of time, it is important to provide as much information as possible in written form so that students can refer back to the information as needed.

Program directors should conduct the pre-departure orientation approximately six weeks prior to departure. Although the length of the pre-departure orientation can vary greatly and might be divided into several sessions, an orientation program should last at least three hours. If possible, organize a panel discussion of past program participants. Be sure to leave plenty of time for discussion and interaction; above all, sufficient time must be given for students to ask questions. No student should leave the orientation with any unanswered questions.

Attendance at the pre-departure orientation should be mandatory. If a student cannot attend the orientation, special arrangements should be made to provide the student with an individual pre-departure orientation. If an individual orientation session is not possible, the program director should make sure that the student receives all of the information presented at the orientation in writing, and the program director should be available for questions.

The content of the pre-departure orientation program should include everything students should know to maximize their study abroad experience and address any concerns or doubts they might have. Students should be given a clear understanding and realistic picture of what to expect, especially regarding the differences they will encounter in the host culture. Students should be given clear guidelines and expectations concerning their conduct while overseas. Give students a clear idea of the academic rigor of the program as well as the amount of free time they might have. It is also helpful to provide a suggested reading list for students so that they can research and read about the background, customs, and culture of their destination. To a large extent, the type, nature, location, and length of the study abroad program will determine the content of the pre-departure orientation. The main goal is to ensure that all the essential information is covered, students' questions are answered, and students feel comfortable about their upcoming experience. To follow is a list of some of the topics which should be included.

### **ESSENTIAL PROGRAM INFORMATION**

#### *LOGISTICS:*

- Passports, visas, and other essential travel documents
- International travel arrangements
- Packing, luggage
- Accommodations and roommates or host families, meals
- Post-arrival travel information (rail passes, International Student ID Cards, youth hostel cards, guidebooks, etc.)
- Transportation at program site
- Program excursions and itinerary
- Expenses and estimated student budget
- Foreign currency, travelers checks, transferring money abroad, credit cards, and bank cards
- How to use telephones in the host country: local calls, international calls, calling cards
- Other communications: mail, e-mail, fax

#### *ACADEMIC INFORMATION:*

- Credit transfer pre-approval
- Registration and pre-registration for the following term
- Grading policies
- Expectations
- Class hours and attendance
- Teaching styles/educational systems
- Facilities and equipment available

#### *LEGAL CONSIDERATIONS AND RESPONSIBILITIES:*

- Contracts/Code of conduct
- Waivers of liability
- Local laws and regulations
- Host and home campus policies and rules applicable to program participants

#### *HEALTH AND SAFETY ISSUES:*

- Required immunizations
- Hospitals, doctors, pharmacies and clinics
- Emergency medical procedures and contacts
- Health and safety conditions and insurance issues in the host country
- Sickness and accident insurance, medical

- Terrorism abroad/State Department Consular Information Sheets and any Travel Advisories or Public Announcements
  - Prescription medication, eyeglasses, contact lenses
- evacuation and repatriation insurance;  
 explanation of health insurance claims procedures, benefits, and exclusions

In addition to the logistical elements of your program, your pre-departure orientation should include information on the host country culture, cross-cultural issues and adaptation, and the unique developmental changes students will undergo while studying abroad. When addressing these topics, it is often helpful to incorporate readings, films, books, journals, testimonials of former participants, and even simulation games. Using a variety of methods will help illustrate these issues.

## **HOST COUNTRY SPECIFIC INFORMATION**

### *LOCAL AND REGIONAL CUSTOMS*

- Nature of social relationships (e.g., between students and professors, students and their host families, etc.) and styles of interpersonal communication
- Attitudes towards women, minorities, and other groups
- Appropriate public conduct
- Political, social, and religious climate of the host country
- Special political, economic, religious, or environmental issues

### *CROSS-CULTURAL SENSITIVITY AND ADAPTATION*

- Understanding and respecting different cultural norms
- How Americans are perceived and received in the host country
- Perceptions of host country nationals
- Cross-cultural communication
- Homesickness and culture shock and phases of adjustment

## **ON-SITE ORIENTATION**

In addition to the pre-departure orientation, program directors should conduct an on-site orientation shortly after arrival.

Elements of the on-site orientation:

- The emphasis should be on students' immediate concerns such as calling home, exchanging money, learning to use local transportation, housing matters, food services, and class registration.
- A campus and city tour soon after arrival is important.
- Allow plenty of time for students to ask questions.
- If applicable, faculty and staff from the host institution, or representatives from third party providers, should be introduced and included in the on-site orientation.

## **IV. RE-ENTRY AND EVALUATION**

### **RE-ENTRY PROGRAMMING**

While it is important for all students who study abroad, re-entry programming is especially necessary for those who have studied abroad for a semester or longer. In general, the greater the cultural differences of the host country, the more important the re-entry activities. However, re-entry activities are important even when students study abroad in countries considered to be culturally similar to the U.S. The purpose of re-entry programming is for students to process their experience, share their experience with other interested individuals, and facilitate re-entry.

Students who study abroad sometimes suffer from reverse culture shock and may have problems adjusting once back in the U.S. They may be disappointed by their friends' or family's lack of interest in hearing about their study abroad experience. Changes in perspectives and values can cause anxiety or discontent which others may not fully understand. Some students may feel that they were more comfortable and at home in the host country. These problems are often exacerbated when students do not anticipate such a response.

Re-entry programming may consist of one or several meetings held both in the host country before the program ends and also at the home campus upon students' return. Sessions should provide opportunities for all students to share their experiences and discuss changes in their attitudes, behavior, and values as a result of studying abroad. Activities should also include cross-cultural communication exercises designed especially for re-entry issues. Such exercises might include values clarification and simulation/role-playing exercises. The following can help address students' re-entry adjustment issues.

#### *PRIOR TO STUDENTS' RETURN TO THE US*

- Lead discussions that summarize the experience through discussions among participants and faculty.
- Provide participants with program evaluation materials to help students process their experience and provide feedback to the director to help improve the program.
- Make individual self-evaluations available to allow students to explore how they have changed since arrival.
- Encourage students to make plans to keep in touch with new friends.
- Begin introducing some current events from home via campus and local newspapers.
- Determine whether students need assistance in registering for classes at their home institution and whether pre-registration is possible for them while abroad.

#### *UPON RETURN TO THE HOME CAMPUS*

- Find ways to involve program alumni in the recruitment of prospective participants.
- Involve returnees in pre-departure orientation sessions for future participants.
- Organize get-togethers for students once they return.

- Ask returnees to contribute to a scholarship fund for future participants.
- Publicize international events and other opportunities on campus such as international honor societies, organizations or other clubs on campus or in the local community. Promote student involvement in any on-campus international activities and supply them with potential options for involvement.
- Make former participants aware of work-abroad programs through organizations like CIEE and BUNAC. Career counseling can point students towards international careers in their field of interest.
- Connect returnees with alumni from your institution who have studied abroad and are now successful business people, politicians, educators, or community leaders.

## **PROGRAM EVALUATION**

In order to ensure the optimal success of a study abroad program, an evaluation should be given the same consideration as any other aspect of the program. No director should fail to address the opportunity to evaluate a program's effectiveness in an attempt to maximize the benefits to students and to determine whether the goals and objectives of the program were met and to more effectively plan future study abroad programs. Through the evaluation, the program coordinator can gauge the degree of learning which took place, the cross-cultural awareness gained, and the personal development and maturity achieved by students. The evaluation can be a tremendous asset for planning future programs and should be the basis for changes or modifications to the program. It is an indispensable part of the process for refining and improving a program, and the institution and department must have a formal role in program evaluation as well.

Students, faculty, and staff should evaluate the following program elements:

- pre-departure advisement and orientation
- academic coursework and methods of instruction
- classroom facilities
- library and computer services
- student support services
- excursions and field trips
- living accommodations and meals
- transportation
- local environment

In addition to collecting written evaluations from participants, it is sometimes useful to conduct an oral group and/or individual evaluation sessions. During the oral evaluation, careful notes should be taken to ensure that all important points are recorded. Both the written and oral evaluation should be comprehensive. It is also very important to explain why the evaluation is necessary and how it will be used. To encourage all students to participate in evaluation activities, the program director might want to reward students with incentives such as a farewell party, t-shirt, or group photo.

To ensure that all students complete an evaluation, it is best to conduct evaluations before departure instead of

requesting that students send completed evaluations to the program director after their return to the US. However, it is also a very good idea to conduct a follow-up evaluation three to six months after the program since many students don't realize how the study abroad experience has affected their perspective, personal development, and academic life until some period of time has elapsed. A follow-up evaluation provides students with an excellent opportunity to reflect upon their experience.

#### *WHAT SHOULD BE DONE WITH THE EVALUATIONS?*

Based on student, faculty, and staff evaluations, the program director must examine how the program met the needs of the institution, the department, and the students. The program director should provide a comprehensive and formal evaluation to the institution and to the sponsoring department. The evaluation should include:

- Perceived strengths and weaknesses of the program
- The projected and actual costs of the program, both in terms of financial costs and in-kind costs contributed by the program director and program staff
- Program enhancements or improvements needed
- Strategies for improvement

The goals, purposes, and objectives of the program that were formally developed in the needs-assessment phase should be re-examined. Determine whether these goals, purposes, and objectives were achieved and whether there were any unforeseen benefits. No program is complete without thorough reflection from various perspectives. Evaluation is the final step in conducting your program and the first step in planning for the next term.

In addition, you may want to make evaluations available to prospective study abroad students to give them additional resource materials for researching programs. You should request permission from the reviewers to have evaluations released to the public and you should make sure that you have reviewed the evaluations to determine that they are suitable for public dissemination.

# Chapter 8

## University System of Georgia Resources

- I. INTERNATIONAL EDUCATIONAL EFFORTS AT THE SYSTEM LEVEL
- II. USEFUL CONTACTS IN THE SYSTEM

### I. INTERNATIONAL EDUCATION EFFORTS AT THE SYSTEM LEVEL

#### **SYSTEM COUNCIL ON INTERNATIONAL EDUCATION (SCIE)**

The president of each institution of the USG appoints one person from his/her institution to serve as that institution's representative to the SCIE. The 35 SCIE representatives (also known as Campus International Coordinators) play an integral role in internationalizing their own campuses. They are also involved in encouraging and facilitating participation in System opportunities designed to accomplish the goals identified in the International Policy of the Board of Regents. A listing of the 35 SCIE representatives and their contact information can be found at <http://www.usg.edu/oie/facstaff/committees/>.

The charge to the SCIE outlining the mission is available at <http://www.usg.edu/oie/facstaff/committees/scie/charge1998.phtml>.

#### **WORLD REGIONAL COUNCILS**

Currently there are four Regional Councils: the Americas, Africa, Asia, and Europe. The Regional Chairs, in collaboration with their respective Councils, initiate and coordinate System-wide international efforts located in or focused on a particular region of the world. Information about the World Regional Councils can be found at <http://www.usg.edu/oie/facstaff/committees/councils.phtml>.

#### **FACULTY AND CURRICULUM COMMITTEE**

The Faculty and Curriculum Committee is a group of faculty and administrators interested in promoting international opportunities for USG faculty and expanding internationally-focused curriculum offerings on USG campuses. For more information, please refer to <http://www.usg.edu/oie/facstaff/committees/fac/>.

#### **STUDY ABROAD COMMITTEE**

The Study Abroad Committee is a standing committee of the System Council for International Education. The Committee Chair is appointed by the Director of International Education, and all interested USG faculty and staff are invited to become members. The primary function of the committee is to promote study abroad in the University System. For more information, please refer to <http://www.usg.edu/oie/facstaff/committees/sa/>.

#### **SYSTEM OFFICE OF INTERNATIONAL EDUCATION**

In addition to the SCIE and its member bodies, the Chancellor's Office supports a System Office of International Education to provide System-level administrative, communications, and technical services for System international initiatives. For more information on the System Office of International Education, please refer to <http://www.usg.edu/oie/>.

## II. USEFUL CONTACTS IN THE SYSTEM

### University System of Georgia Board of Regents Office of International Education

<p>Dr. Richard Sutton Assistant Vice Chancellor for International Programs &amp; Senior Advisor for Academic Affairs Phone: 404-651-3747 richard.sutton@usg.edu</p> <p>Ms. Sue Watson Assistant Director of International Programs Phone: 404-651-2954 sue.watson@usg.edu</p> <p>Ms. Susan Pratt Assistant Director for International Education Phone: 404-651-2951 susan.pratt@usg.edu</p>	<p>Ms. ReLiang Tsang GLOSSARI Project Coordinator Phone: 404-657-1333 reliang.tsang@usg.edu</p> <p>Ms. Carrie Sloan Assistant to the Director Phone: 404-651-2950 carrie.sloan@usg.edu</p> <p>Office of International Education 270 Washington St. SW., Ste. 6045 Atlanta, GA 30334 Phone: 404-651-2950 Fax: 404-651-2976 www.usg.edu/oie</p>
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### SCIE Committee Chairs

<p><b>Study Abroad</b> Dlynn Armstrong-Williams Political Science/Criminal Justice Department North Georgia College &amp; State University 201 Young Hall Dahlonega, GA 30597 Phone: 706-864-1869 Fax: 706-864-1874 dfarmstrong@ngcsu.edu</p>	<p><b>International Students and Scholars</b> Chaudron Gille Director, Center for Teaching, Learning &amp; Leadership Professor of French Gainesville State College P.O. Box 1358 Gainesville, GA 30503 Phone: 678-717-3692 Fax: 770-531-6067 cgille@gsc.edu</p>
<p><b>Faculty and Curriculum</b> Debra Denzer Director, Center for International Ed. Georgia Perimeter College 555 North Indian Creek Drive Building D-1110 Clarkston, GA 30021 Phone: 678-891-3232 Fax: 404-298-4930 debra.denzer@gpc.edu</p>	



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# Chapter 9

## Resources for Study Abroad Advising and Administration

- I. GENERAL RESOURCES
- II. RESEARCH REGARDING STUDENTS ABROAD
- III. RESOURCES ON UNDERREPRESENTED POPULATIONS IN STUDY ABROAD
- IV. RESOURCES IN CROSS-CULTURAL ADAPTION
- V. FUNDING FOR STUDY AND RESEARCH ABROAD
- VI. HEALTH, SAFETY, AND TRAVEL ABROAD
- VII. INTERNET RESOURCES
- VIII. LISTSERVS
- IX. ASSOCIATIONS, AGENCIES AND PUBLISHERS

### I. GENERAL RESOURCES

**Basic Facts on Study Abroad.** (2000). White, D. IIE, NAFSA and CIEE. \$27 per 50 (members) or \$36 per 50 (nonmembers) from NAFSA.

<http://www.nafsa.org>

*Basic information for students interested in an educational experience abroad.*

**CIEE Occasional Papers.** Various authors/dates. New York: Council on International Educational Exchange. Free.

[http://www.ciee.org/research\\_center/occasional\\_papers.aspx](http://www.ciee.org/research_center/occasional_papers.aspx)

*These reports focus on various aspects of the education abroad field, including studies on U.S. student populations overseas, participation of minorities in education abroad, faculty exchanges, international business programs, the nature of international education, and essential considerations for developing successful programs in the developing world.*

**Designing Sustainable Educational Linkages with Institutions in Developing Countries.** (1995). Jenkins, K. 32 pp. Washington, D.C.: NAFSA. \$10 from NAFSA.

<http://www.nafsa.org/publication.sec>

*This practical guide to establishing programs with developing countries outlines the five steps of program development and gives examples of successful programs.*

**Getting on with the Task: A National Mandate for Education Abroad.** Report of the National Task Force on Undergraduate Education Abroad. (1990). NAFSA, IIE and CIEE. Reprinted as an appendix in W. Hoffa, and J. Pearson (Eds.), NAFSA's Guide to Education Abroad for Advisers and Administrators. Washington DC: NAFSA: Association of International Educators. *Summarizes studies to date and makes recommendations for expanding education abroad, increasing diversity, making curricular connections, inhibitors to be addressed, and funding education abroad.*

**The Guide to Successful Short-Term Programs Abroad.** Sarah E. Spencer and Kathy Tuma, editors: (2002). NAFSA. \$39 members; \$52 nonmembers; plus shipping and handling. 20% discount for 5-9; 25% discount for 10 or more copies.

<http://www.nafsa.org/publication.sec>

*A practical guide to directing and administering one- to eight-week programs abroad.*

**International Educator.** NAFSA. Magazine – six issues per year. For non-members: \$35 per year in the United States; \$48 in Canada and Mexico; \$63 elsewhere; or included in NAFSA membership fee.

<http://www.nafsa.org/publication.sec>

*Essays on major issues and trends in international education.*

**Internet Resources for Education Abroad** <http://www.umich.edu/~icenter/swt/study/resources/internet2000.html>

*An online list of resources for international education professionals.*

**Learning Across Cultures.** (1994). Gary Althen, Editor. NAFSA: \$15 members; \$20 nonmembers; bundle of 25: \$125 members; \$167 nonmembers.

<http://www.nafsa.org/publication.sec>

*Provides a vital overview of cross-cultural communication and a detailed, yet accessible, deconstruction of cultural barriers.*

**NAFSA.news.** NAFSA. Weekly newsletter. Included in NAFSA membership fee. <http://www.nafsa.org>

*Explores the latest developments in international educational exchange, carries in-depth examinations of issues and articles on practical applications of knowledge in the field, and provides commentary on governmental actions.*

**NAFSA's Guide to Education Abroad for Advisers and Administrators, Third Edition. (2005).** Patricia C. Martin, Joseph L. Brockington, William W. Hoffa, editors; 1.800.836.4994: NAFSA. \$75 (members) or \$100 (nonmembers) plus shipping and handling from NAFSA.

<http://www.nafsa.org/publication.sec>

*This new edition of the Guide adds such topics as short-term programs, intercultural learning, underrepresented constituencies, and community colleges. All of the topics covered in previous editions have been completely updated to include the latest information and resources.*

**Optimizing Health Care in International Educational Exchange.** John Rogers and David Larsen. Free online from NAFSA.

<http://www.nafsa.org/publication.sec>

*This free online book offers expert guidance for managing health care services for students in international educational exchange.*

**Promising Practices: Spotlighting Excellence in Comprehensive Internationalization.** (2002). Engberg, D., and Green, M. (Eds.). Washington, D.C.: American Council on Education. \$18 (members) or \$20 (nonmembers) from ACE.

<http://www.acenet.edu//AM/Template.cfm?Section=Home>

*A showcase of the efforts of eight U.S. colleges and universities that are leading the movement to educate a globally competent citizenry. Each case study details the college's goals, programs, and activities related to internationalization, as well as challenges and future plans.*

**Study Abroad: A Parent's Guide.** (1998). William Hoffa. NAFSA. \$15 members; \$20 nonmembers; per bundle of 25: \$125 members; \$167 nonmembers.

<http://www.nafsa.org/publication.sec>

*Full-length book specifically geared to what parents want and need to know about study abroad. It assumes that while students themselves, working in conjunction with campus advisers, bear the primary responsibility for deciding whether to study abroad and for choosing the program that best matches their academic needs, learning styles, and personal interests, informed parental involvement and support are essential before, during, and after the overseas sojourn.*

**Transitions Abroad.** Bi-monthly magazine available from Transitions Abroad, tel: (800) 293-0373. For one year (6 issues): \$20 in the United States; \$24 in Canada; \$46 from elsewhere plus \$10 for airmail from Transitions Abroad.

<http://www.transitionsabroad.com>

*This is the only U.S. periodical that gives extensive coverage to all varieties of education abroad, from study, working, and volunteering abroad to socially responsible independent travel.*

## II. RESEARCH REGARDING STUDENTS ABROAD

**The Journal of Studies in International Education.** Association for Studies in International Education (ASIE). Thousand Oaks, CA: Sage Publications. \$69 (individual) or \$422 (institution) from ASIE. <http://www.asie.org>  
*Begun by CIEE, the Journal is now published quarterly by the Association for Studies in International Education. It provides a forum combining the research of scholars, models from practitioners in the public or private sector, and essays.*

**Open Doors 2006.** (2006). IIE: Annual. \$49.95 from IIE. <http://opendoors.iienetwork.org/>  
Many of the Open Doors tables are also available online at <http://opendoors.iienetwork.org/>. *Definitive statistics from IIE's annual survey of the numbers of foreign students studying in the United States as well as the number of U.S. students studying abroad.*

**Research on U.S. Students Abroad, Volume II, 1988-2000.** Maureen Chao (Ed.). Available online in searchable format at the University of Southern California's web site. <http://www.lmu.edu/globaled/index.html>  
*A comprehensive listing of detailed abstracts for studies through 2000 on U.S. students studying or working abroad.*

**Students Abroad: Strangers at Home.** (1992). Kauffmann, N., Martin, J., and Weaver, H. Yarmouth, ME: Intercultural Press. 208 pages. \$40 from amazon.com. *Examines the study abroad experience from the student's point of view and provides a theoretical framework for understanding the effects of a study abroad experience on students, along with recommendations for increasing the effectiveness of programs.*

**Study Abroad: The Experience of American Undergraduates.** (1990). Carlson, J, Burn, B., Useem, J., and Yachimowicz, D. Westport, CT: Greenwood Press. 243 pages. \$95 from amazon.com. *Landmark study by a team of American and European researchers on the effects of study abroad on students' learning and development, contrasting students who study abroad with those who do not.*

## II. RESOURCES ON UNDERREPRESENTED POPULATIONS IN STUDY ABROAD

**Black Students and Overseas Programs: Broadening the Base of Participation.** (1991). Council on International Educational Exchange. New York: CIEE. Free. <http://www.nafsa.org/publication.sec>  
*Addresses the issue of underrepresented groups in education abroad. Practical and positive advice by faculty, administrators, and students. Authors include Johnnetta Cole, Holly Carter, Robert Bailey, and Margery Ganz.*

**BMCPIE-L.** E-mail group for NAFSA's Black and Multicultural Professionals in International Education (BMCPIE). Subscribe free by sending a message reading "subscribe bmcpie-1 first name last name institution" to: [listserv@clermson.edu](mailto:listserv@clermson.edu); leave subject field blank. *E-mail announcement group for advisors interested in promoting greater involvement of minorities in international education.*

**Building Bridges: A Manual on Including People with Disabilities in International Exchange Programs.** (2000). Mobility International. Eugene, OR: Mobility International. \$20.  
[http://www.miusa.org/publications/books/bb\\_html](http://www.miusa.org/publications/books/bb_html)  
*Nearly 200 pages of suggestions and creative ideas for including, recruiting and accommodating people with disabilities in international programs.*

### NAFSA Rainbow SIG

<http://www.indiana.edu/~overseas/lesbigay/>

*A special interest group within NAFSA: Association of International Educators that serves to counsel international students and study abroad students who are gay, lesbian, bisexual, or transgendered.*

**A World Awaits You (AWAY).** Mobility International. Eugene, OR: Mobility International. Free.

<http://www.miusa.org/publications/freeresources/worldawaits>

*A journal of success in international exchange for people with disabilities. Includes personal experience stories, accommodation information and opportunities for people with disabilities.*

**A World of Options: A Guide to International Exchange, Community Service and Travel for Persons with Disabilities, Third Edition.** (1997). Bucks, C. Eugene, OR: Mobility International. 659 pages. \$18 (Clearance price).

<http://www.miusa.org/publications/books/worldofoptions>

*Comprehensive guide to international exchange, study abroad, volunteer service, and travel for persons with disabilities.*

## IV. RESOURCES ON CROSS-CULTURAL ADAPTATION

**American Cultural Patterns: A Cross-Cultural Perspective.** (1991). Stewart, E., and Bennett, M. Yarmouth, ME: Intercultural Press. 208 pages. \$27.50.

<http://www.interculturalpress.com/store/pc/mainIndex.asp>

*Contrasts the assumptions and values of mainstream American culture with other cultures of the world. Analyzes patterns of perception, thinking, behavior, and belief which characterize culture in four major categories: form of activity, form of social relations, perception of the world, and perception of the self.*

**The Art of Crossing Cultures (Second Edition).** (2001). Storti, C. Yarmouth, ME: Intercultural Press. 158 pages. \$17.95.

<http://www.interculturalpress.com/store/pc/mainIndex.asp>

*Analyzes the personal challenges inherent in the cross-cultural experience, based on psychological and communication theory as well as on the perceptions of some of the world's greatest writers.*

**The Exchange Student Survival Kit.** (1993). Hansel, B. Yarmouth, ME: Intercultural Press. 122 pages. \$16.95.

<http://www.interculturalpress.com/store/pc/mainIndex.asp>

*Covers issues from cultural baggage to culture shock and re-entry. Although the book is based on high-school students' experiences, it would be useful for any kind of student exchange.*

**Learning Across Cultures.** (1994). Althen, G. (Ed.). Washington, D.C.: NAFSA. 200 pages. \$15 (members) or \$20 (non-members) from NAFSA. <http://www.nafsa.org/publication.sec>

*A collection of essays providing an up-to-date overview of cross-cultural theories and practice. Writing on topics from counseling student sojourners ("revisiting the U-Curve of adjustment") to cross-cultural training. Contributors include Judith N. Martin, Margaret Pusch, Janet and Milton Bennett, Kay Thomas, Gary Althen, and others.*

**Maximizing Study Abroad: A Student's Guide to Strategies for Language and Culture Learning and Use.**

(2002). Paige, R. M., Cohen, A., Kappler, B., Chi, J., and Lassegard, J. Minneapolis: University of Minnesota. \$12

<http://www.nafsa.org/publication.sec>.

*Guide aimed at students who want to make the most of their study abroad experience that helps students identify and use a wide variety of language and culture learning strategies.*

**Survival Kit for Overseas Living: For Americans Planning to Live and Work Abroad (Fourth Edition).**

(2001). Kohls, L. R. Yarmouth, ME: Intercultural Press. 204 pages. \$16.95.

<http://www.interculturalpress.com/store/pc/mainIndex.asp>

*Provides a series of practical, do-it-yourself exercises for Americans planning to live and work abroad. Offers guidelines on how to set objectives for an overseas experience, how to become a foreigner with style and understanding, how to get to know your host culture, and how to combat culture shock.*

**Theories and Methods in Cross-Cultural Orientation.** (1986). Martin, J. (Ed.). Special edition of International Journal of Intercultural Relations. Vol. 10, no. 2. Pergamon Press. Out of print, but available in libraries. *This series of articles addresses theoretical issues related to cross-cultural orientation and training. Several of these are reprinted in the .Paige volume, Education for the Intercultural Experience.*

**Transcultural Study Guide.** Volunteers in Asia. (1975; reprinted 1987). 155 pages. \$7.95 from VIA, P.O. Box



20266, Stanford, CA 94309; tel: (415) 725-1803. *A series of questions designed to help students make the most of an educational experience abroad.*

**The Travel Journal: An Assessment Tool for Overseas Study.** (1991). Taylor, N. New York: CIEE. Occasional Paper on International Educational Exchange No. 27. Free from CIEE.

[http://www.ciee.org/research\\_center/occasional\\_papers.aspx](http://www.ciee.org/research_center/occasional_papers.aspx)  
*Practical guide to writing and evaluating student travel journals.*

**Writing Across Culture: An Introduction to Study Abroad and the Writing Process.** (1995). Wagner, K., and Magistrale, T. New York: Peter Lang Publishing Inc. 154 pages.

Recommended by the authors for pre-departure reading, this book discusses culture shock and coming to terms with it through writing an "analytical notebook," achieving cultural- and self-understanding in the process.

## V. FUNDING FOR STUDY AND RESEARCH ABROAD

**Financial Aid for Research and Creative Activities Abroad 2006-2008.** (2005). Schlachter, G. A., and Weber, R. D. (Eds.). El Dorado Hills, CA: Reference Service Press. 432 pages. \$45. Revised every 2 years.

[http://www.rspfunding.com/prod\\_prodalpha.html](http://www.rspfunding.com/prod_prodalpha.html)

*Lists 1,200 funding sources available to support research, professional development, teaching assignments, or creative activities. Sources mainly for graduate students, postdoctorates, professionals; relatively few for undergraduate and high school students. Indices for level of study, location, and subject.*

**Financial Aid for Study and Training Abroad 2006-2008.** (2005). Schlachter, G. A., and Weber, R. D. (Eds.). El Dorado Hills, CA: Reference Service Press. 398 pages. \$39.50. Revised every 2 years.

[http://www.rspfunding.com/prod\\_prodalpha.html](http://www.rspfunding.com/prod_prodalpha.html)

*Lists 1,000 funding sources available to support formal educational programs such as study abroad, training, internships, workshops, or seminars. Sources for high school students, undergraduate and graduate students, and postdoctorates; some for professionals. Indices by level of study, location, and subject.*

**Financial Resources for International Study: A Guide for U.S. Nationals.** (1996). O'Sullivan, M., and Steen, S. (Eds.). New York: Institute of International Education. 320 pages. \$39.95. <http://www.iiebooks.org/finresforins.html>

*Authoritative and comprehensive directory based on a survey of over 5,000 organizations and universities in the United States and abroad. Lists funding sources available to support undergraduate, graduate, post doctorates, and professional learning abroad from study and research to internships. Indices by level of study, subject, and organization name.*

**Free Money for Foreign Study.** (1992). Blum, L. New York: Facts on File, Inc. 262 pages.

*Lists, both by country and subject, more than 1,000 grants and scholarships that can help a student finance study abroad.*

**The International Scholarship Book: The Complete Guide to Financial Aid for Study Abroad.** (1990). Cassidy, D. Upper Saddle River, NJ: Prentice Hall. 389 pages. *Lists and details more than 1,700 graduate and undergraduate scholarships, grants, and internships for study in dozens of countries and in every major academic field.*

**University System of Georgia Office of International Education**

[http://www.usg.edu/oie/study\\_abroad/resources/](http://www.usg.edu/oie/study_abroad/resources/)

*Information on financial aid and scholarships for University System of Georgia students as well as links to study abroad scholarship search engines.*

## VI. HEALTH, SAFETY, AND TRAVEL ABROAD

**Able to Travel: True Stories by and for People with Disabilities.** (1994). Alison Walsh (Ed.). London: Rough Guides. *Country-by-country coverage of travel around the world by people with disabilities. First-hand accounts and practical information.*

**British Foreign and Commonwealth Office**

<http://www.fco.gov.uk>

*Provides country-specific information on traveling safely in the UK and around the world.*

**Canadian Department of Foreign Affairs and International Trade**

<http://www.dfait-maeci.gc.ca>

*Contains Canada-specific information on traveling safely.*

**Centers for Disease Control (CDC), Traveler's Health**

<http://www.cdc.gov/travel/>

*The federal government's CDC provides the latest and most authoritative information on health conditions and immunizations for travel worldwide.*

**The Electronic Embassy**

<http://www.embassy.org/>

*Web sites and contact information for foreign embassies in the U.S.*

**Foreign Embassies in the U.S. (U.S. Department of State)**

[www.state.gov/s/cpr/rls/fco/](http://www.state.gov/s/cpr/rls/fco/)

*Web sites of foreign embassies in the U.S.*

**The Handbook for Women Abroad.** (1991). Wemhoener, J. (Ed.). 61 pages. Available from Kenyon College, Office of International Education, Gambier, OH 43022; tel: (614) 427-5637. Ask for price.

*Features first-hand accounts of women who studied, worked, and traveled worldwide. Topics include feminism, sexual harassment, religion and gender, friendships and dating, and host family dynamics. Project was sponsored by a NAFSA COOP grant.*

**International Dialing Guides and Access Numbers.**

AT&T Free upon request; tel: (800) 222-0400; fax: (800) 805-6663.

<http://www.consumer.att.com/global/english/>

MCI. <http://www.minutepass.com/>

Sprint. [http://csg.sprint.com/faq/cc\\_ldi\\_accessguide/](http://csg.sprint.com/faq/cc_ldi_accessguide/)

Global One Universal Card. [www.globalcalling.com/isep](http://www.globalcalling.com/isep)

*Guides to access numbers abroad for reaching U.S. telephone companies.*

**International Travel and Health.** World Health Organization. 2005.

<http://www.who.int/ith/en/>

*An annual journal that provides details about vaccination requirements and side effects, disease hazards, food and drink, sexually transmitted diseases, and basic suggestions for travel organizers.*

**International Travel Health Guide 2006.** (2006). Rose, S. Travel Medicine Inc. Available from Travel Medicine for \$19.95; tel: (800) 872-8633.

<http://www.travmed.com>

*Includes a list of travel clinics.*

**Key Officers of Foreign Service Posts.** U.S. Department of State. <http://foia.state.gov/mms/KOH/keyoffcity.asp>

*Lists addresses, telephone, and fax numbers of every U.S. embassy and consulate abroad. Also lists names and titles of foreign service officers.*

**Links to United States Embassies and Consulates Worldwide.** U.S. Department of State.

<http://usembassy.state.gov/>

*Links to U.S. embassies and consulates abroad that have web sites.*

**OANDA Corporation**

<http://www.oanda.com/converter/classic/>

*Useful web site in determining U.S. dollar - foreign currency equivalents.*

**A Safe Trip Abroad.** U.S. Department of State.  
[http://travel.state.gov/travel/tips/safety/safety\\_1108.html](http://travel.state.gov/travel/tips/safety/safety_1108.html)  
*Many useful tips for safety abroad.*

**SAFETI**

<http://www.globaled.us/safeti>  
*Develops and disseminates resources to support study abroad program development and implementation, emphasizing issues of health and safety.*

**Services and Information for American Citizens Abroad.** U.S. Department of State.  
[http://travel.state.gov/travel/travel\\_1744.html](http://travel.state.gov/travel/travel_1744.html)  
*Describes support services for U.S. citizens overseas from A to Z.*

**Student Travels.** Free from STA Travel; available free in bulk for education abroad offices; tel: (800) 781-4040.  
<http://www.statravel.com/>  
*Magazine with information on rail passes, insurance, work, and study opportunities abroad, airfares, car rentals, and other services offered by STA Travel. Includes articles by students on their experiences abroad.*

**Study Abroad Health Insurance**

[http://www.usg.edu/oie/study\\_abroad/resources/health\\_safety.phtml](http://www.usg.edu/oie/study_abroad/resources/health_safety.phtml)  
*Information on the University System of Georgia study abroad health insurance provider, CISI.*

**Time Around the World**

<http://www.timeanddate.com/>  
*This Web site lists the current time of virtually every country in the world and gives you a formula for calculating it from Greenwich Mean Time.*

**Travelers Medical Guide: Practical Advice for a Safe Trip.** (1990). Haas, E. Traveler's Health Publications. *This is a pocket guide in which general preparedness is emphasized.*

**U.S. Department of State Travel Warnings and Consular Information Sheets.** U.S. Department of State.  
[http://travel.state.gov/travel/cis\\_pa\\_tw/tw/tw\\_1764.html](http://travel.state.gov/travel/cis_pa_tw/tw/tw_1764.html)  
*Warnings for travel to particular countries as well as Consular Information Sheets containing general travel information about most countries, including country descriptions, entry requirements, availability and condition of medical facilities, crime and safety information and location of U.S. embassy.*

## VII. INTERNET RESOURCES

### UNIVERSITY SYSTEM SITES OF NOTE

**Africa Council** <http://www.gpc.edu/~jkahiga/usac.html>

**Americas Council** <http://www.kennesaw.edu/ac/>

**Asia Council** <http://www.kennesaw.edu/globalinstitute/council.htm>

**European Council** <http://www.valdosta.edu/europeancouncil/index.htm>

**List of System Institutions' Web Sites** <http://www.usg.edu/oie/students/financial/links.phtml>

**University System of Georgia Committee on International Students and Scholars**  
<http://www.usg.edu/oie/facstaff/committees/ciss/>

**University System of Georgia Office of International Education** <http://www.usg.edu/oie/>

**University System of Georgia Faculty and Curriculum Committee**  
<http://www.usg.edu/oie/facstaff/committees/fac/>

**University System of Georgia Study Abroad Catalog** <http://www.usg.edu/oie/catalog/>

**University System of Georgia Study Abroad Committee** <http://www.usg.edu/oie/facstaff/committees/sa/>

## ORGANIZATIONS RELATED TO INTERNATIONAL EDUCATION

**Association of International Education Administrators (AIEA)** <http://www.aieaworld.org/>  
*A membership organization composed of institutional leaders engaged in advancing the international dimensions of higher education. Information on grants, public policy, and the AIEA annual conference.*

**The Forum on Education Abroad (The Forum)**  
<http://www.forumea.org>  
*An organization whose members are educational institutions, consortia, agencies, organizations, and individuals that provide, direct, or manage educational opportunities in the field of education abroad.*

**Georgia Association of International Educators (GAIE)**  
<http://www.gaie.org>  
*Professional resource for international educators in the state of Georgia.*

**Institute of International Education (IIE)**  
<http://www.iie.org>  
*Provides information about services and publications offered by IIE, including Fulbright and other scholarships, IIE's directory of education abroad programs (HE Passport) and the Open Doors surveys (statistics on international education).*

**NAFSA: Association of International Educators**  
<http://www.nafsa.org>  
*The primary professional organization for advisors and administrators in international education. NAFSA publications and essential resources for professionals.*

## VIII. LISTSERVS

**GAIE-L**  
<http://www.gaie.org>  
*Discussion group for international educators in the state of Georgia.*

**SECUSS-L**  
<http://listserv.buffalo.edu/cgi-bin/wa?SUBED1=secuss-l&A=1>  
[http://www.secussa.nafsa.org/list\\_index.htm](http://www.secussa.nafsa.org/list_index.htm)  
*Essential discussion group for university education abroad advisors. List managers are volunteers of NAFSA's MicroSIG team, acting on behalf of the SECUSSA team. Searchable SECUSSA archives are located at <http://listserv.buffalo.edu/archives/secuss-l.html>.*

**University System of Georgia Study Abroad Committee**  
Committee Chair, Jim Anderson. (912) 921-5671; [andersja@mail.armstrong.edu](mailto:andersja@mail.armstrong.edu).  
To be included on the listserv, please contact Charu Goyle at [charu.goyle@usg.edu](mailto:charu.goyle@usg.edu).  
*E-mail list for members of the System Study Abroad Committee.*

**University System of Georgia International Students and Scholars Committee**

Committee Chair, [Akanmu Adebayo](#), Kennesaw State University, [aadebayo@kennesaw.edu](mailto:aadebayo@kennesaw.edu).

To be included on the listserv, please contact Charu Goyle at [charu.goyle@usg.edu](mailto:charu.goyle@usg.edu).

*E-mail list for members of the System International Students and Scholars Committee.*

**University System of Georgia Faculty and Curriculum Committee**

Committee Chair, Debra Denzer, Georgia Perimeter College, [ddenzer@gpc.edu](mailto:ddenzer@gpc.edu).

To be included on the listserv, please contact Charu Goyle at [charu.goyle@usg.edu](mailto:charu.goyle@usg.edu)

*E-mail list for members of the System Faculty and Curriculum Committee.*

**U.S. Department of State Listservs**

<http://www.state.gov/www/listservs/cms.html>

*Sign up to receive updated Consular Information Sheets and Travel Warnings by e-mail or subscribe to other State Department listservs.*

## IX. ASSOCIATIONS, AGENCIES, AND PUBLISHERS

**American Association of Collegiate Registrars and Admissions Offices (AACRAO).** One Dupont Circle NW, Suite 520, Washington, DC 20036; tel: (202) 293-9161; fax: (202) 872-8857; e-mail: [info@aacrao.org](mailto:info@aacrao.org).

<http://www.aacrao.org/>

*Professional association and publisher of guides for evaluating domestic and international transfer credit.*

**Council on International Educational Exchange (CIEE).** 7 Custom House, 3<sup>rd</sup> Floor, Portland, ME 04101; toll free (800) 40-STUDY; fax: (207)-553-7699; e-mail: [info@ciee.org](mailto:info@ciee.org). <http://www.ciee.org>

*Information on study, work and volunteer programs offered through CIEE, membership in the consortium, and CIEE's Occasional Papers in International Educational Exchange.*

**Institute of International Education (IIE).** IIE Books, Fullfillment Center, PO Box 1020, Sewickley, PA 15143-1020; tel: (800) 445-0443; fax: (301) 206-9789; e-mail: [iiebooks@abdintl.com](mailto:iiebooks@abdintl.com). Free catalog.

<http://www.iie.org>

*Publisher of authoritative directories for study or teaching abroad and financial aid, and distributor of Central Bureau (United Kingdom) publications on working abroad.*

**Intercultural Press.** 100 City Hall Plaza, Suite 500, Boston, MA 02108; tel: (888) 273-2539; fax: (617) 523-3708.

Free quarterly catalog. <http://www.interculturalpress.com>

*Publications dealing with cross-cultural issues in settings ranging from academic to business.*

**Mobility International USA (MIUSA).** 132 E. Broadway, Suite 343, Eugene, OR 97401 e-mail: [info@miusa.org](mailto:info@miusa.org); tell TTY (541) 343-1284; fax: (541) 343-6812.

<http://www.miusa.org/>

*Publications and videos on including persons with disabilities in international exchange and travel programs.*

**NAFSA Publications.** NAFSA Publications Center, PO Box 391, Annapolis Junction, MD 20701-0391; tel: (800) 836-4994; fax:(412) 741-0609, <http://www.nafsa.org>. Free catalog. For membership information, contact NAFSA: Association of International Educators, 1307 New York Avenue, NW, 8<sup>th</sup> Floor, Washington, DC 20005-4701; tel: (202) 737-3699; fax: 202737 3657; e-mail: [inbox@nafsa.org](mailto:inbox@nafsa.org).

<http://www.nafsa.org>

*Essential publications for advisors and administrators in international educational exchange.*

**Transitions Abroad.** Transitions Abroad Publishing, PO Box 745, Bennington,VT 05201 . Tel: (802) 442-4827. .

<http://www.transitionsabroad.com>

*A magazine with directories of resources for study, work, and educational travel abroad, as well as selected articles on international topics.*