

## **Appendix K: International Academic Study Tour Policies and Forms**

### **International Academic Study Tours Policy and Procedure Approved April 2014**

#### **Introduction**

For the past two years Shepherd University has been engaged in conversations regarding campus internationalization, and through those conversations goals have been identified for study abroad, supporting infrastructure, programming, faculty research abroad, and the recruitment of international students and faculty. The Internationalization Committee, with guidance from the American Council on Education (ACE) Internationalization Collaborative, completed a 10-year Internationalization Strategic Plan, 2012-2022, drawing input from all areas of the campus. Study tours are an important component of the internationalization plan and an area where Shepherd has seen considerable activity over the past several decades. In addition to internationalization, recent campus discussions on “workload to credit issues” for online and hybrid courses have prompted similar questions regarding study abroad experiences.

Liability, state compliance, and workload to credit issues were the major driving forces behind the creation of the Study Abroad Task Force by Dr. Ames, Provost, in the fall of 2013. Specifically, the Task Force was asked to research, discuss, and compose a set of recommendations pertaining to workload to credit ratio, class time prior to trip, compensation, security and risk issues, approval of annual offerings, support by the Study Abroad Office, and the collection of deposits and funds. This document is the result of several Task Force meetings, online research, input from the business, procurement, legal counsel, Registrar’s, and Continuing Education offices, feedback from the Study Abroad Board chaired by Ann Henriksson, and review by Deans’ Council, Faculty Senate, and Executive Staff. The Task Force consists of Ann Henriksson, Study Abroad Director; Dr. Keith Alexander, Assistant Professor of History; Dr. Denis Berenschot, Associate Professor of Spanish; and Dr. Ann Marie Legreid (Chair), Professor of Geography and Dean of the School of Business and Social Sciences.

### **Definition of International Academic Study Tour**

An international academic study tour is a short-term (one month or less), faculty/staff-led, university-sponsored academic course involving group travel outside of the United States. It is intended to build international and intercultural knowledge and appreciation.

### **Annual Offerings of Academic Study Tours**

Recommendations for academic study tours will come from academic departments. Tour proposals must be approved by the appropriate chair, dean, and Provost prior to recruitment and enrollment of students into the tour (The proposal form is downloadable from the Office of the Provost website as well as the Study Abroad website). The Procurement Officer and Study Abroad Director must receive a copy of the approval form from the tour leader. Courses with study tour components are subject to the normal schedule and course approvals from the college dean and Provost. Departments are encouraged to be strategic in their planning to avoid schedule conflicts and undue competition.

### **Course Integrity**

Study tour courses bear academic credit; therefore, these courses are to uphold the same standards of rigor and workload to credit ratio as any traditional credit-bearing course. Shepherd University has professional standards and expectations for course syllabi and the same standards shall be applied to courses with study tour components. In addition to items on the syllabus checklist, the syllabus must include the tour itinerary, required travel arrangements, and a link to the Study Abroad webpage where students can get details on application procedures and information on international travel. Syllabi will undergo normal review by department chairs and deans, and the Provost if needed, to assure course integrity.

Departments are encouraged to develop dedicated catalog courses that could be used for short-term study tours. Once in the catalog, the study abroad course may be used in fall, spring, and summer sessions. It is left to the departments and faculty leader(s) to decide on any additional requirements for study tour participants, e.g., pre-requisites, grade point average, and accumulated credit hours. In the case of graduating seniors all academic work, including the study tour, must be completed prior to commencement.

In cases where a dedicated course does not exist for study tours, the course creation form must be completed for a special topics course. The department chair, in consultation with the department, will review the syllabus before moving the course creation form forward. The course and its syllabus must receive approval via the course creation form from the department chair, college dean, and Provost. The course creation form is delivered to the Office of the Registrar for proper processing into the system.

Student learning should be supported by appropriate disciplinary readings, e.g., journal articles, essays, book chapters, and scholarly web resources. Pre- and post-study classroom sessions with substantive academic content are a professional expectation. The syllabus should clearly articulate what class sessions are mandatory, and if the tour component is also mandatory. It is the responsibility of the tour leader's departmental colleagues, chair or supervisor, and dean to monitor the academic integrity of the proposed study tour.

### **Coordination and Leadership of Academic Study Tours**

All international academic study tours sponsored by Shepherd University must be coordinated through the campus Study Abroad Office. The Study Abroad Office will assist the tour leader with details pertaining to the study tour and serve as the repository for the appropriate documents for each participant. The Study Abroad Office will work with each tour leader to provide guidance and information for pre-departure orientation, including information on crisis management.

Each study tour must have a leader-instructor of record who is a Shepherd University faculty or staff member and who has been approved by the department chair and college dean. In cases where the department chair is the tour organizer, approval must come from the college dean and the Provost. If a dean is the tour organizer, approval must come from his/her department chair and the Provost. Staff members intending to lead study tours must be approved by their immediate supervisor as well as their supervising vice president, in addition to the appropriate department chair and dean.

Study tours may include co-leaders who receive some form of compensation, e.g., airline tickets, meals, lodging, and/or a stipend. When there are co-leaders, those individuals should have legitimate roles in the study tour, e.g., course planning, logistics, instruction, and evaluation. They should be appropriately approved as co-leaders (see above), and have their duties clearly outlined in advance of the study tour and on file with the department chair and dean.

### **Contracts with the University**

The contract and/or itinerary and other submissions to the Study Abroad Office must include full tour details, compensation by the university (if applicable), and full disclosure of compensation from external providers (if applicable). Cancellation and refund policies are to be clearly articulated in the documentation. It is understood that the students will remain the first priority of the tour leader(s) and that the tour leader(s) will be available to the students for the duration of the tour as specified in the syllabus. All contracts associated with a study tour will

be in the name of the University and will be signed by an authorized administrator from the Office of Administration and Finance. This applies to self-planned tours as well as packaged and customized tours by a tour company. Participants are not to be enrolled until the contract-approval process is complete.

### **Items required by the Study Abroad Office**

A draft syllabus with a study tour component and preliminary tour details, approved by the department chair and/or dean, must be delivered to the Study Abroad Office with the contract(s) and at least 6 months prior to the date of departure.

In addition, the study tour leader(s) must provide passport and emergency information; a detailed itinerary, including all flight information; names of hotels with phone numbers; and the tour leader(s)' cell phone number(s). All required travel information must be completed online on the Study Abroad website no later than three weeks in advance of departure for fall and spring semesters, and by the last full week of spring classes for summer tours. Any faculty member failing to submit required information by the deadline will not be permitted to lead a tour the next year. The appropriate dean and Provost will review violations on a case-by-case basis.

### **Marketing and Enrollment in Academic Study Tours**

The Study Abroad Office will post information about upcoming academic study tours to its website. Both university and non-university marketing outlets and strategies may be utilized for recruitment. All tour participants must be properly registered as “students” at Shepherd University before commencing the tour. Shepherd University students are to enroll in study tours for academic credit through the normal RAIL registration system. Any student dropped for non-payment/financial aid issues has the normal right to file a petition for re-instatement with the Admissions and Credits Committee.

Community participants will enroll through the Shepherd University non-credit bearing Continuing Education Study Tour. In the event that minor children under the age of 18 wish to enroll in a study tour, special risk management strategies must be handled through the university's legal counsel.

Tour participants are required to complete their paperwork online on the Study Abroad website; this constitutes the formal application. The tour leader accepts them into the program. An automatic acceptance e-mail is then sent to the participant who is asked to complete the emergency information online, i.e., one or two emergency contacts, release form, and passport information.

### **Release Form**

Academic study tour participants are required to complete/sign an online release form (Study Abroad website) with the university prior to tour departure. In the interests of maintaining flexibility with these tours, students may request to stay longer than the specified time for the tour. Any deviation from the scheduled tour itinerary, including departure/return dates, should be approved in advance of travel. If the tour leader(s) or the University's Study Abroad Office determine that a tour participant has significantly disrupted the successful administration of a study abroad tour, for this or any other reason, the Office may suspend such person from future participation. Violators will be dealt with according to established university policy.

### **Insurance Coverage for Academic Study Tours**

For university-sponsored international travel, all participants must purchase the insurance policy approved by the university in advance of travel. Tour leaders' insurance costs will be included in the participants' Shepherd program fees. The refund policy, if applicable, must be clearly articulated in the documentation.

### **Collection of Deposits and Funds**

The Shepherd University business office will handle all deposits and funds related to a study tour, posting them to the respective student accounts. Tour companies that direct bill will be allowed to do so. Arrangements with tour companies that do not direct bill participants will be made on a case-by-case basis. Tour leaders may receive cash advances through the Office of Procurement or, if appropriate, from the Shepherd University Foundation. The West Virginia state procurement cards may not be used for cash advances either domestically or internationally.

Course and tour revenue must cover all expenses unless arrangements have been made and approved to use supplemental funds from the department, college, or other university account. Faculty leaders are encouraged to budget an extra 5% into the cost of the tour as a contingency.

### **Travel Orientation**

A detailed, pre-departure orientation is required for all tour participants. Tour leaders are expected to contact the Study Abroad Office and/or governmental websites for travel advisories and pertinent country information to be shared with tour participants.

### **Tour Leader's Expenses and Faculty Load**

The tour leader's (and co-leader's) travel expenses may be covered by a tour company or, in the case of a self-planned tour, be incorporated into the participants' tour fees. In other words, the

faculty member developing the study tour may build the travel costs into the overall budget, with each student paying his/her share of the tour leader(s)' expenses. Compensation, travel expenses, and other benefits must be approved by the university.

Academic study tours may be counted in the faculty member's course load during the academic year with approval by the appropriate dean and the Provost. For summer sessions, faculty will be compensated using the current summer rate, and if the course is under-enrolled, the compensation will be pro-rated. The Provost establishes the summer enrollment minimums.

### **Compensation from Travel Companies and Other External Providers**

Compensation in any form from tour companies and other external providers will be reported to and, consistent with state policy, becomes the property of Shepherd University and must be directed to the office of the Vice President for Administration and Finance for management. Bonus points and other incentives resulting from these tours may be used for approved business travel by the tour leader/co-leader and/or to the benefit of the tour leader's academic department for University business. These benefits may be used by the tour leader for his/her university-approved professional development activities.