

PACIFIC LUTHERAN UNIVERSITY
Wang Center for Global Education
Policies and Guidelines:
Essential and Non-Essential Accompanying Adults and Minors
in PLU Short-term Study Away Courses
Approved by the GEC on
May 17, 2013

INTRODUCTION AND GUIDING PRINCIPLES

Below are the guidelines, policies, and procedures regarding the accompaniment of three categories of persons other than PLU student participants on PLU short-term study away courses: essential and non-essential adults and minors. For purposes of this policy, short-term study away courses include, but are not limited to, J-Term and Summer Study Away courses, MBA embedded study tours and credit-bearing off campus field-courses. By way of introduction, the principles guiding these policies for short-term courses are:

- When teaching PLU short-term study-away courses, the faculty leader assumes student safety and security as a first priority along side the quality and centrality of the students' academic and intercultural learning.
- PLU is committed to the development of all faculty in the area of global education, a commitment that must be supported by a policy that enables faculty program leaders to travel with family members if necessary.

1.- GUIDELINES AND PROCEDURES, FINANCIAL SUPPORT FOR ESSENTIAL ACCOMPANYING ADULTS

In limited cases, at the discretion of the Wang Center and in consultation with the Provost, financial support can be provided for accompanying adults that contribute essential services to the course's implementation abroad. Examples of "essential services" include, but are not limited to, the following circumstances;

- The accompanying adult is selected for the Program Assistants Professional Development Opportunity
- The accompanying adult is a person with expertise in the course content and/or has experience and contacts on site that will significantly enhance the quality of the course
- The accompanying adult provides additional leadership support

Decisions regarding support of accompanying adults performing essential course-related functions for a short-term study away course will be made based on the budget and program fees of the course for which the assistant is being requested, the strength of the submitted rationale, and financial considerations such as travel, lodging, and course enrollments.

Not all requests will be met. Additionally, when considering a selection of candidates for participation in a short-term study away course as an accompanying adult performing essential program duties, preference will normally be given to PLU faculty or staff.

A. Procedures

1. A request for support for the addition of an essential non-PLU accompanying adult to a short-term study away course must be made in writing by November 1 to Megan Grover, Short-term Program Mgr., Wang Center for Global Education at megan.grover@plu.edu. The request must include the following:

- name(s), age(s), relationship(s) of the accompanying adult and dates of their travel
- documentation of credentials of accompanying adult if relevant (e.g. a CV or Bio)
- rationale for providing support for other adult

- recommended compensation for the accompanying adult if that person will be contributing a significant academic component to the course
- back-up plan in the event that the accompanying person should require emergency medical attention
- back-up plan in the event that the accompanying person should withdraw from the program for any reason
- statement that outlines what travel arrangements, if any, the Wang Center will make for accompanying adult

2. The notification will be reviewed by the appropriate Wang Center staff for consideration of liability implications and final written approval will be sent out no later than June 1 of the year following the notification requested in item # 1, above, was sent.

3. Subsequent to approval, a Service Contract will be drawn up and must be signed by the accompanying adult performing essential services by no later than November 1 of the fall prior to the short-term study away course in which he or she will be participating.

4. The program leader must demonstrate that all accompanying persons have adequate domestic and international (if applicable) health insurance (medical expenses and evacuation and repatriation) coverage during off-campus travel.

5. The accompanying adult must sign PLU's Statement of Responsibility and Authorization Release form.

2.- GUIDELINES AND PROCEDURES FOR NON-ESSENTIAL ACCOMPANYING ADULTS

An adult may accompany the program leader of a short-term course for the duration of the program or a significant portion of the program as long as it does not interfere with the leader's duties to the program and students. For minors accompanying the program leader, please see guidelines and procedures in Section 3.

A. Procedures

1. If planning to travel with accompanying person(s) in a short-term study away course, by November 1, a program leader must provide written notification to Megan Grover, Short-term Program Mgr., Wang Center for Global Education at megan.grover@plu.edu. The notification must include the following:

- name(s), age(s), relationship(s) of the accompanying persons and dates of their travel
- description of steps that will be taken to ensure that accompanying persons will not disrupt the academic and intercultural experience of PLU students enrolled in the short-term study away course
- back-up plan in the event that the accompanying person should require emergency medical attention
- statement that outlines what travel arrangements, if any, the Wang Center will make for accompanying persons

2. The notification will be reviewed by the appropriate Wang Center staff for consideration of liability implications and final written approval will be sent out by no later than June 1 of the year following the notification requested in item #1, above, was sent.

B. Financial Obligations, Pre-Travel, Insurance, and Other Arrangements

1. If arrangements for accompanying persons will be required, travel and onsite expenses for accompanying persons must be paid directly by the program leader to the Wang Center and will be due at the same time that students are required to pay their fees and the same refund policies will apply.
2. Program funds may not be used to pay for accompanying persons. This information must be made transparent for all those involved in the program, especially the students, so there is no misunderstanding that student fees are subsidizing non-participants.

3. Unless there is a per-person cost for accommodations, accompanying persons may share the program leader's accommodation. Responsibility of costs of additional rooms and other per person costs rests with the program leader.
4. Air, lodging and local transportation arrangements are made to accommodate the needs of the students and program leaders and not of accompanying persons.
5. Accompanying persons are not permitted to share accommodations with students.
6. Program leaders are normally responsible for obtaining passports and visas for all accompanying persons.
7. The program leader must demonstrate that all accompanying persons have adequate domestic health insurance (medical expenses and evacuation and repatriation) coverage during off-campus travel.
8. The accompanying adult must sign PLU's Statement of Responsibility and Authorization Release form.
9. The accompanying adult should understand that their primary role on the off-campus program is that of spouse and/or caretaker of any dependent children also accompanying the leader unless approved as an Essential non-PLU accompanying person under Section 1 of this policy. For liability purposes, it is important that the accompanying adult not assume any responsibilities related to the academic program.

NOTE: Program leaders and accompanying persons should not schedule major medical procedures during the program. If a routine procedure is required to manage a chronic condition, the program leader must consider if it is appropriate to have the accompanying person on the program. The accompanying person is responsible for making all medical arrangements, and the university takes no responsibility.

3.- GUIDELINES AND PROCEDURES FOR ACCOMPANYING MINORS

A program leader's children or legal dependents under the age of 18 may accompany the faculty member for the duration of the program or for a significant portion of the program as long as it does not interfere with the leader's duties to the program and students. For children under 15, a second adult is required to care for the child(ren).

A. Procedures

1. If planning to travel with minors on a short-term study away course, by November 1, a program leader must provide written notification to Megan Grover, Short-term Program Mgr., Wang Center for Global Education at megan.grover@plu.edu. The notification must include the following:
 - name(s) and age(s) of the accompanying minors and dates of their travel
 - description of steps that will be taken to ensure that accompanying minors will not disrupt the academic and intercultural experience of PLU students enrolled in the short-term study away course
 - a statement outlining back-up plans in the event of the following three scenarios: the program leader must respond to a program emergency, the program leader requires emergency medical attention, the minor requires emergency medical attention
 - statement that outlines what travel arrangements, if any, the Wang Center will make for accompanying minors
2. The notification will be reviewed by the appropriate Wang Center staff for consideration of liability implications and final written approval that will be sent out by no later than June 1 of the year following the notification requested in item # 1, above, was sent.

B. Financial Obligations, Pre-Travel, Insurance, and Other Arrangements

1. If arrangements for accompanying minors will be required, travel and onsite expenses for accompanying minors must be paid directly by the program leader to the Wang Center and will be due at the same time that students are required to pay their fees and the same refund policies

will apply.

2. Program funds may not be used to pay for accompanying minors. This information must be made transparent for all those involved in the program, especially the students, so there is no misunderstanding that student fees are subsidizing non-participants.
3. Unless there is a per-person cost for accommodations, accompanying minors may share the program leader's accommodation. Responsibility of costs of additional rooms and other per person costs rests with the program leader.
4. Air, lodging and local transportation arrangements are made to accommodate the needs of the students and program leaders and not of accompanying minors.
5. Accompanying minors are not permitted to share accommodations with students.
6. Program leaders are normally responsible for obtaining passports and visas for all accompanying minors.
7. The program leader must demonstrate that all accompanying minors must have adequate domestic health insurance (medical expenses and evacuation and repatriation) coverage during off-campus travel.
8. The program leader must sign PLU's Statement of Responsibility and Authorization Release form for accompanying minor(s).

NOTES: Grandchildren, nephews, and nieces who are not a program leader's legal dependents are not considered dependents, but rather extended family. They are normally not permitted to accompany the program unless they are enrolled as students in the program.

Program leaders should not schedule major medical procedures for minors during the program. If a routine procedure is required to manage a chronic condition, the program leader must consider if it is appropriate to have the accompanying minor on the program.

4.- SUGGESTED GUIDELINES FOR FACULTY CONSIDERING TRAVEL WITH MINORS

The following additional suggested guidelines are borrowed from the *The Guide to Successful Short-term Programs Abroad* 2nd Ed¹ co-edited by Sarah Spencer, Director of Study Abroad at the University of St. Thomas in Minnesota:

Previous program leaders offer the following guidelines and considerations. Before you invite accompanying minors on your short-term program, as well as when you prepare for the program's departure, please give these guidelines consideration.

General Guidelines

- Hiring participating students for child-care purposes is not acceptable. Doing so creates a dual relationship between professor and student, with potential for conflict of interest.
- Program leaders should use their best judgment regarding interaction between their students and accompanying adults and children. Careful consideration should be made about the different aspects of your course, such as classes, lecturers, site visits, group dinners and overnight excursions, and when interaction with your guests is appropriate and when it is not.
- If co-directing a program, consider the impact of accompanying minors on the other leader. Seek approval and consensus of expectations from your colleague before making a final determination. Also consult with in-country hosts (university, program provider, tour operator, etc.) if applicable.
- Accompanying minors should be adequately prepared for the program, just like your students. What can they expect regarding travel? What cultural resources are available? How will they prepare for a different language?
- If you have organized a group check-in at the airport, accompanying minors should check-in

¹ Spencer, Sarah E. and Tuma, Kathy, *The Guide to Successful Short-term Programs Abroad*, 2nd Ed., Washington, D.C.: NAFSA, 2007.

separately – either before or after your group. This allows program leaders to focus on students' questions and excitement, as well as to meet their parents.

- Depending on the course location, consider what kind of lodging and transportation will be used by accompanying minors.

Suggestions/Questions from Past Program Leaders with Children

- How does your child deal with routine and transitions? How will travel affect children in regards to their routine and what obstacles need to be considered? What portions of the routine from home can be transported, maintained and/or adapted for travel?
- What kind of foods or dietary changes need to be addressed? What will you do with a picky eater? (suggestion – bring their favorite foods and snacks)?
- How will you handle the potential disruption of the child's routine, especially on days when the program moves (e.g. travel days)? How will you handle unexpected (for 'typical toddler to preschool') behavior from your child, especially if the child is near the student group?
- Spouses/partners should be prepared to be a single parent for a significant portion of the program, especially if you maintain a shared-parenting model at home. Depending on the program, leaders may be busy in the evenings with student dinners, reflection or debriefing meetings or events.