

**PACIFIC LUTHERAN UNIVERSITY**  
**Wang Center for Global Education**  
**Policies and Guidelines:**  
**Essential and Non-Essential Accompanying Adults and Minors**  
**in PLU Study Away Programs**  
**Approved by the GEC on May 17, 2013**  
**Updated on September 6, 2018**

**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 study away programs: essential and non-essential adults and minors. For purposes of this policy, study away programs include, but are not limited to, semester Gateway and Featured programs, J-Term, Alternative Spring Break and Summer Study Away courses, MBA Global Business Perspectives programs, Alumni Travel Seminars, and credit-bearing off campus field-courses. By way of introduction, the principles guiding these policies for study away programs are:

- When leading or teaching PLU study away programs and courses, the faculty leader assumes student safety and security as a first priority alongside 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 program'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/program
- The accompanying adult provides additional leadership support

Decisions regarding support of accompanying adults performing essential course/program-related functions for a study away program will be made based on the budget or program fees of the program 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 study away program 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 study away program must be made in writing by November 1 to Megan Grover, Assistant Director and Short-Term Study Away Program Manager, Wang Center for Global Education at [megan.grover@plu.edu](mailto: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 program
- 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 two months prior to the study away program 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 study away program 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 study away program, by two months prior to the program start date, a program leader must provide written notification to Megan Grover, Assistant Director and Short-Term Study Away Program Manager, Wang Center for Global Education at [megan.grover@plu.edu](mailto: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 study away program
- 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 one month prior to the program start date.

### **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. The only exception to this rule are PLU Gateway Semester Program Site-Directors, who may utilize their travel allowance to pay for accompanying person's travel. For more information on Gateway Program Semester Site-Director Travel Allowances, see Supplemental Appointment Statement provided to and signed by the Gateway Site Director.

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) available 24/7 should an emergency arise.

#### **A. Procedures**

1. If planning to travel with minors on a study away program, by two months prior to the program start date, the program leader must provide written notification to Megan Grover, Assistant Director and Short-Term Study Away Program Manager, Wang Center for Global Education at [megan.grover@plu.edu](mailto: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 study away program
  - 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 one month prior to the program start date.

## **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. The only exception to this rule are PLU Gateway Semester Program Site-Directors, who may utilize their travel allowance to pay for accompanying minor's travel. For more information on Gateway Program Semester Site-Director Travel Allowances, see Supplemental Appointment Statement provided to and signed by the Gateway Site Director.
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 2<sup>nd</sup> Ed*<sup>1</sup> 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

---

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

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 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.