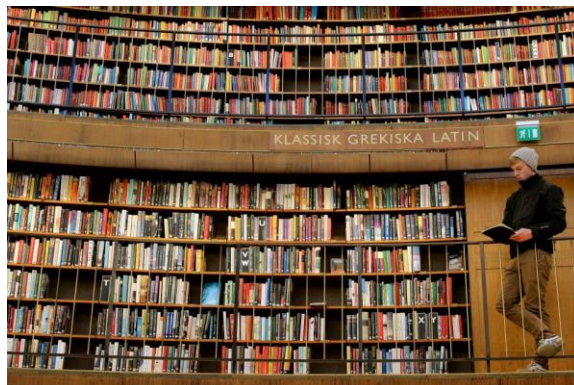


GLOBAL EDUCATION COMMITTEE/WANG CENTER FOR GLOBAL EDUCATION



SHORT-TERM STUDY AWAY COURSE PROPOSAL GUIDELINES AND POLICIES

GENERAL INFORMATION

The Global Education Committee reviews all short-term study away J-Term, Spring Break, and Summer course proposals submitted to the Wang Center and recommends approval/denial of course proposals to the Executive Director of the Wang Center, who in turn makes recommendations to the Provost. *The Provost makes the ultimate decision on whether a course is approved.*

The Global Education Committee's review and recommendation to the Wang Center Executive Director is based on 1) the course's academic framework, 2) evidence of the proposal's forethought with regard to addressing [Integrative Learning Objectives](#), and 3) viability of the proposed site(s).

Additionally, the GEC's recommendation takes into account the overall distribution of study away courses across academic units, frequency with which any given course is offered, geographical distribution of courses proposed any given year as well as overall enrollment projections in study away.

*As an academic support unit, one of the Wang Center's primary functions is to partner with faculty to provide administrative and logistical support in the development and implementation of short-term study away courses. In your planning please remember that the Wang Center has resources and expertise to provide **assistance in all stages of development** of off-campus courses including proposals and planning, logistical and administrative support, marketing, recruitment, orientation, and returner support.*

The Global Education Committee, in collaboration with the Wang Center, has developed the following Guidelines for the submission of the '**Short-Term Study Away Course Proposal**'.

PROPOSAL GUIDELINES

Successful course proposals should address the following:

SOLID ACADEMIC FRAMEWORK

- The course material should reflect an academic rigor equal to a four-credit course on campus. The course should integrate lectures, seminar discussions, reading and written assignments with on-site activities including lectures, tours, service learning opportunities, etc.
- The course should demonstrate evidence that the study away site is utilized as both "text" and context to achieve at least two [Integrative Learning Objectives](#) in a course that, given its unique connection to a specific site, **COULD NOT** be taught on campus.
- Evidence that the course will facilitate learning communities that enhance individual and group learning.

ACTIVITIES THAT ENGAGE THE HOST COMMUNITY

- The course should include opportunities for students to dialog with a range of viewpoints and voices in the host community(ies).
- The course should include cultural programming, such as attendance at local events or a dinner/home stay with a host family, with special attention to cultural sensitivity.
- Assignments that engage students with community and local perspectives, such as exchanges with on-site partners, service learning projects and other experiential learning opportunities should be included.

ADDRESS BASIC LANGUAGE AND CULTURAL ACTIVITIES WHERE APPROPRIATE

- The course should include language acquisition of basic phrases, vocabulary building and listening skills.
- It should include instruction on intercultural training that includes site-specific cultural norms and customs, gender dynamics, ideas of space and time, etc.
- Think about incorporating disciplinary appropriate pedagogical tools and reflection to develop cultural self- and other-awareness across differences such as: journaling, creative writing, comparative analysis, descriptive field notes, visual representations, research projects.

PLEASE CONSIDER PLU'S VALUES OF DIVERSITY, SOCIAL JUSTICE AND SUSTAINABILITY

- Your course design should draw attention to issues of diversity, social justice and sustainability in the host country/ies either in the present day or through a historical lens (e.g. development in Bolivia, Holocaust Studies in Eastern Europe, climate change in Antarctica, etc.).

SPECIFIC PRE-TRAVEL CONSIDERATIONS

- Be prepared to clearly identify any possible health risks to students—risks include a) specific health issues related to the location of travel and b) health risks that may put an individual student at physical risk including strenuous physical requirements. *Please consult with the Health Center with any questions about these health risks.*
- For liability purposes and to optimize program quality, safety, and success, **a minimum of three** pre-departure orientations are required for all J-Term, Spring Break, and Summer short-term study away courses, arranged by the faculty leader(s).

- Careful consideration should be given to the number of sites proposed to visit, the geographical proximity to each other and the time spent traveling between them.
- Between the last scheduled pre-departure orientation and the date that final receipts are due, a final syllabus for the short-term study away course that reflects accurately the expectations, grading criteria, activities and locations shall be submitted to Megan Grover in the Wang Center per best practices in higher education.
- Travel itineraries should consider the impact of carbon offsets and address other ways to conserve resources, mitigate impact of the travel, etc.
- Travel itineraries [completed with the help of the Wang Center] should take into consideration financial costs as they impact student access/ability to participate.

IF A HOME STAY EXPERIENCE IS PART OF THE PROGRAM, PLEASE CONSIDER THE FOLLOWING:

- Arrangements for student (e.g. private bedroom or private or shared bath).
- Meal arrangements and access to kitchen/ laundry facilities.
- Number, gender and age of current occupants.
- Guidelines for home stay including curfew, alcohol or tobacco use, etc.
- Distance of home from classroom or academic meeting space, and transportation issues (if relevant).
- Orientation for host families and formal "meet and greet" session between host families and students.

PROPOSAL SUBMISSION POLICIES AND PROCEDURES

1. Please review all proposal guidelines and policies.
2. Please complete the 'Short-Term Study Away Course Proposal' application by November 6th.
3. Proposals are normally for four-credit courses; please make a special note if your class is not four-credits.
4. Make sure your course has EPC and or General Education Council approval or it is a current course found in the PLU course catalog—or it will not be considered.
5. You must obtain department and school or division approval before submitting a study away course proposal.
6. The Global Education Committee (GEC), Wang Center Executive Director and Provost will then review course proposals.
7. You will receive notification about your course in December.

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/participant 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. 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. 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. 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* 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 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.

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

ADDENDUM to “WANG CENTER FOR GLOBAL EDUCATION POLICIES AND GUIDELINES: ESSENTIAL AND NON-ESSENTIAL ACCOMPANYING ADULTS AND MINORS IN PLU SHORT-TERM STUDY AWAY COURSES” regarding university determination of essential services and IRS compliance of “bona fide purpose of travel” for accompanying adult/spouse/partner travel support.

As per the Wang Center for Global Education policy on “Essential and Non-Essential Accompanying Adults and Minors in PLU Short-term Study Away Courses”, 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.

Additionally, it is important to note that, under federal tax law, university-funded travel for spouses/partners is taxable compensation to the employee UNLESS there is a documented “bona fide business purpose” for the participation of the spouse/partner.

NOTE: The following IRS definition relates specifically to spousal relationships only.

Bona Fide Business Purpose for Spousal Travel – IRS Definition

In order for the travel of the accompanying spouse to not be taxable to the employee, the presence of the spouse must be essential (not just beneficial) to the University employee being able to carry out his/her business purpose for the University. A determination of whether an employee’s spouse serves a bona fide business purpose as defined by the IRS will be based on the following criteria:

1. The degree to which the “dominant purpose” of the travel is to aid the employee’s business purpose of promoting the University’s objective.
2. Whether the spouse’s presence on the program is necessary to effectively carry out the duties of the employee.
3. The extent to which the spouse’s presence on the trip is to provide more than “incidental” business related services to the employee (e.g., typing notes attending to ministerial or scheduling matters, attendance at meals, etc. are considered incidental).
4. The time spent by the spouse on personal activities in comparison to the activities related to the business of the University.

Based on current documentation from the IRS, the following purposes for spousal travel are not likely to be considered bona fide business purposes, and thus the cost of the travel will be taxable income to the University employee:

1. The spouse’s performance of some incidental service or ministerial task (such as taking notes) or accompanying the employee to luncheons and dinners. The spouse must perform substantive business related functions.
2. An expectation that the spouse will be present at related social functions or that the spouse’s presence will promote goodwill with the other attendees.

University approval of “bona-fide purpose of travel” of accompanying adult/spouse/partner

To align the aforementioned policy with federal tax law, henceforth and in the context of PLU short-term study away courses, “bona fide business purpose” refers to essential services, which, for both accompanying adults and spouses/partners include, but are not limited to, the following circumstances;

- The accompanying adult is selected for the Program Assistant 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

In order for the university to determine if there is a “bona fide business purpose” for the accompanying adult/spouse/partner, the employee must fill out the attached “Checklist and Instructions for Determining Bona Fide Business Purpose for Spousal/Partner/non-PLU Accompanying Adult Travel”. If the university determines that a bona fide business purpose for travel does not exist, any amounts reimbursed or paid directly for accompanying adult/spouse/partner for travel must be included in the taxable wages of the employee.

INSTRUCTIONS AND CHECKLIST FOR DETERMINING

BONA FIDE BUSINESS PURPOSE FOR SPOUSAL/PARTNER/NON-PLU ACCOMPANYING ADULT TRAVEL

You should complete this form when:

1. you are requesting funding for an accompanying spouse/partner/non-PLU accompanying adult on a Short-term study away course, and
2. the spouse/partner/non-PLU accompanying adult will perform an essential function for the program

Please complete the checklist below to assist the Wang Center in determining whether the accompanying spouse/partner/non-PLU accompanying adult travel meets the IRS requirement for “bona fide business purpose.”

Submit the checklist along with a written request for support for the addition of a spouse/partner/non-PLU accompanying adult to a short-term study away course to Megan Grover, Assistant Director, Wang Center for Global Education at megan.grover@plu.edu. The request must include the following:

- name(s), age(s), relationship(s) of the spouse/partner/non-PLU accompanying adult and dates of their travel
- documentation of credentials of spouse/partner/non-PLU accompanying adult if relevant (e.g. a CV or Bio)
- rationale for providing support for spouse/partner/non-PLU accompanying adult
- recommended compensation for the spouse/partner/non-PLU accompanying adult if that person will be contributing a significant academic component to the course
- back-up plan in the event that the spouse/partner/non-PLU accompanying adult should require emergency medical attention
- back-up plan in the event that the spouse/partner/non-PLU accompanying adult should withdraw from the program for any reason
- statement that outlines what travel arrangements, if any, the Wang Center will make for spouse/partner/non-PLU accompanying adult

Which of the following best describes the business purpose of the spouse/partner/non-PLU accompanying adult for whom you are requesting support?

1. - The spouse/partner/non-PLU accompanying adult is selected for the Program Assistant Professional Development Opportunity. Please explain.

2. - The spouse/partner/non-PLU 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. Please explain.

3. - The spouse/partner/non-PLU accompanying adult provides additional leadership support. Please explain.

Submitted by (program leader): _____

DATE: _____

Rec'd by (Megan Grover, Assistant Director): _____

DATE: _____

Approved by Wang Center Executive Director: _____

DATE: _____

Approved by Provost: _____

DATE: _____