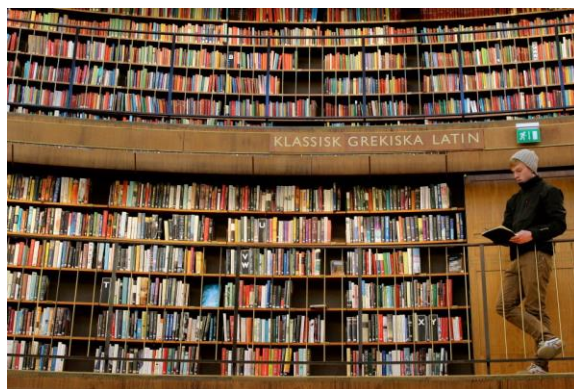


# GLOBAL EDUCATION COMMITTEE/WANG CENTER FOR GLOBAL AND COMMUNITY ENGAGED EDUCATION



## OFF-CAMPUS COURSE PROPOSAL GUIDELINES AND POLICIES SHORT-TERM STUDY AWAY PROGRAMS

### GENERAL INFORMATION

The Global Education Committee reviews all off-campus 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 considers 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<sup>1</sup> to provide administrative and logistical support in the development and implementation of off-campus 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** application in Terra Dotta.

### 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**

considered in special circumstances. In determining the allocation of funds, priority will be given to full time tenured and tenure-track faculty.

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<sup>1</sup> For purposes of Wang Center sponsored activities, "eligible faculty" include all full time tenured, tenure-track, visiting faculty members, and associates to the faculty at PLU. Participation of emeritus faculty and members of the PLU staff for mentoring or research purposes will be

- 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 off-campus 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 off-campus, short-term course that reflects accurately the expectations, grading criteria, activities and locations shall be submitted to the Manager of Short-Term Programs 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 October 15th.
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.

**PLEASE REVIEW IN FULL IF YOU PLAN TO INCLUDE ESSENTIAL AND NON-ESSENTIAL ADULTS  
OR MINORS WITH YOU**

**PACIFIC LUTHERAN UNIVERSITY**  
**Wang Center for Global and Community Engaged 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 April 6, 2022**

**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, teaching, or assisting PLU study away programs and courses, the faculty leader/site coordinator/program assistant 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/staff in the area of global education, a commitment that must be supported by a policy that enables faculty program leaders, site coordinators, and program assistants 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 at least six months prior to the program start date to the Program Manager, Wang Center for Global and Community Engaged Education. 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 Wang Center Executive Director and program administrators as appropriate for consideration of liability implications. Final written approval will be sent out between three and five months prior to the program start date.
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/site coordinator/program assistant 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. For essential accompanying adults who hold Service Contracts with the Wang Center, a complete background check must be provided before contract is finalized. Essential accompanying adults who do not complete a background check should not spend time one-to-one with students.
6. Essential accompanying adults 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/site coordinator/program assistant 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/site coordinator/program assistant, 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 at least six months prior to the program start date, a program leader must provide written notification to the Program Manager. 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
2. The notification will be reviewed by the Wang Center Executive Director and program administrators as appropriate for consideration of liability implications. Final written approval will be sent out between three and five months prior to the program start date.

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

- a. All travel arrangements, accommodations, and any other associated expenses are the sole responsibility of the faculty leader/site coordinator/program assistant and their non-essential accompanying adult. This includes any expenses incurred during a crisis situation. The Wang Center will not make arrangements or payments on behalf of a non-essential accompanying adult, but can provide limited information pertaining to itineraries and logistics.
- b. 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.
- c. Unless there is a per-person cost for accommodations, accompanying persons may share the program leader's/site coordinator's/program assistant's accommodation. Responsibility of costs of additional rooms and other per person costs rests with the program leader/site coordinator/program assistant.
- d. Accompanying persons are not permitted to share accommodations with students.
- e. Program leaders/site coordinators/program assistants are responsible for obtaining passports and visas for all non-essential accompanying persons.
- f. 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.

### **C. Expectations**

1. The non-essential accompanying adult must complete a background check if they will be present for more than one week. Please have the background check sent to the Program Manager. Non-essential accompanying adults who do not complete a background check should not spend time one-to-one with students.
2. The non-essential accompanying adult must sign PLU's Statement of Responsibility and Authorization Release form.
3. The non-essential accompanying adult shall not assume any responsibilities related to the academic program.
4. Participation of non-essential accompanying adults in program activities is at the discretion of the faculty leader/site coordinator/program assistant; however, consideration should be given first and foremost to the effect on the student

experience. Costs for any program activities remain the sole responsibility of the non-essential accompanying adult.

### **3.- GUIDELINES AND PROCEDURES FOR ACCOMPANYING MINOR DEPENDENTS**

A faculty leader's/site coordinator's/program assistant's children or legal dependents under the age of 18 may accompany the faculty leader/site coordinator/program assistant 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. As stated in the [PLU Minors on Campus Policy](#), faculty leaders/site coordinators/program assistants are expected to supervise their accompanying minor throughout the study away program. For children under 15, a second adult is required to care for the child(ren) and be available 24/7 should an emergency arise. Programs arranged with assistance from a third-party program provider may require additional policies or documentation.

#### **A. Procedures**

1. If planning to travel with dependent minors on a study away program, by six months prior to the program start date, the program leader must provide written notification to the Program Manager. The notification must include the following:
  - name(s) and age(s) of the accompanying dependent minors and dates of their travel
  - description of steps that will be taken to ensure that accompanying dependent 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.
2. The notification will be reviewed by the Wang Center Executive Director and program administrators as appropriate for consideration of liability implications. Final written approval will be sent out between three and five months prior to the program start date.

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

1. All travel arrangements, accommodations, and any other associated expenses for any dependent minors are the sole responsibility of the faculty leader/site coordinator/program assistant. This includes any expenses incurred during a crisis situation. The Wang Center will not make arrangements or payments on behalf of any accompanying dependent minor, but can provide limited information pertaining to itineraries and logistics.
2. Program funds may not be used to pay for accompanying dependent 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 dependent 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 dependent minors.
5. Accompanying dependent minors are not permitted to share accommodations with students.
6. Program leaders are responsible for obtaining passports and visas for all accompanying dependent minors.
7. The program leader must demonstrate that all accompanying dependent minors have adequate domestic health insurance (medical expenses and evacuation and repatriation) coverage during off-campus travel.

#### **C. Expectations**

1. The faculty leader/site coordinator/program assistant and accompanying dependent minor must sign PLU's Statement of Responsibility and Authorization Release form.
2. Participation of accompanying dependent minors in program activities is at the discretion of the faculty leader/site coordinator/program assistant; however, consideration should be given first and foremost to the effect on the student experience. Costs for any program activities remain the sole responsibility of the faculty leader/site coordinator/program assistant.
3. 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.

### **4.- SUGGESTED GUIDELINES FOR FACULTY/SITE COORDINATORS /PROGRAM ASSISTANTS CONSIDERING TRAVEL WITH MINORS**

For children under 18, please consider a limited power of attorney when a second adult is not present.

The following additional suggested guidelines are borrowed from the *The Guide to Successful Short-term Programs Abroad* 2<sup>nd</sup> Ed<sup>2</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 study away program, as well as when you prepare for the program's departure, please give these guidelines consideration.

### **General Guidelines**

- 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.

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<sup>2</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.

**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 Courtney Olsen, Manager of Short-Term Programs, Wang Center for Global Education at [olsencd@plu.edu](mailto:olsencd@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.

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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.

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

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Submitted by (program leader): \_\_\_\_\_

DATE: \_\_\_\_\_

Rec'd by (Courtney Olsen, Manager of Short-Term Programs): \_\_\_\_\_

DATE: \_\_\_\_\_

Approved by Wang Center Executive Director: \_\_\_\_\_

DATE: \_\_\_\_\_

Approved by Provost: \_\_\_\_\_

DATE: \_\_\_\_\_