

Bates College

Fall Semester Abroad Program

Planning Handbook

This booklet is designed to assist faculty who are planning and directing a Bates Fall Semester Abroad program. It contains sections on:

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**Additional material and forms are online at:
www.bates.edu/offcampus/faculty/**

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August 2015

1. Program Planning and Management – General Advice

The Fall Semester Abroad Program requires faculty to be detailed planners, recruiters, money managers, administrators, and student counselors. Faculty have found the experience to be exhausting and arduous, but ultimately energizing and tremendously rewarding. Some general advice for program planning and administration include:

- Consult periodically the webpages that the Off-Campus Study Office has developed for the Fall Semester Abroad Programs: bates.edu/offcampus/faculty/fsa This handbook is designed to be used in tandem with this online information.
- Consult with faculty who have led programs in the past, repeat this as the program goes through different stages. Similarly, consult with Stephen Sawyer or David Das, assistant director of off-campus study programs, whenever you have questions and are uncertain of a college policy.
- Share tasks and responsibilities with the other faculty member participating on the program. These may include the managing the recruitment effort, working with the host-institution and housing, managing travel arrangements, arranging student visas, or managing the budget. The list depends on the experience and skills your team.
- Rely on the individuals and offices at Bates that already serve many of the required functions. The **Off-Campus Study Office** will advise on the brochure, provide application forms, serve as an information source for students, be the site where applications may be picked up and turned in, and serve as a communications point for you and families while the program is underway. The **Admissions Office** can help recruit the new students. The **Communications Office** will help design and produce the brochure. The **Human Resources Office** can offer guidance in hiring the program assistant and discussing benefits. The **Financial Office** will help with money management and accounting procedures. **Academic Administrative Assistants** provide secretarial support. The **Health Center** can provide medical and immunization advice and serve as a reference point when abroad.
- Carefully select a fully professional language institute, college, or similar host-country institution to support the program and provide essential services. Typically, this entity works with the faculty to arrange language courses, home stays, internet access, and other local arrangements. Most faculty travel to the program site early in the planning process to meet the key contacts and to plan local arrangements with the host institution.
- Develop a calendar for the program with the activities of each day fully outlined. This will form the framework for your planning and budgeting process.
- Most importantly, recognize that leading an FSA program is a far more extensive commitment to students than teaching on campus. Planning and participating in weekend activities with students, coping with emergency health needs and trips to the hospital, counseling students in crisis, admonishing irresponsible behavior, nurturing a positive group dynamic are all inherent parts of a successful program.
- Enjoy the life-long friendships and relationships the program will generate.

2. The Program and Courses

The academic program consists of four courses, usually an initial intensive language course followed by three courses - a second language course and two thematic courses. Host-country professionals teach the language courses. All the grades are included in the student's grade point average. Similar to being on campus, students may elect, during registration and within the first 10 days of classes, to have one of the courses graded on a pass/fail basis. Grades are submitted online according to the usual deadline for fall grade submission. The students evaluate the two faculty courses similar to those taught on campus and also complete a program evaluation.

Once a program is approved, the faculty submit proposals for their two courses following the same process used for proposing an on-campus course. The Committee on Curriculum Review and Registrar's Office will consult with the faculty involved to finalize the program's course numbers, titles, and descriptions for publication in the Catalog. The Agreement Form that students sign and Faculty legislation specify that the students take four courses while enrolled on the program. Students may take a substitute course if necessary for reasons such as fluent language proficiency or if one of the regular courses is judged inappropriate by the program director.

The foreign language courses have received low scores in past student evaluations. There can be the assumption that teaching skill comes naturally to native speakers working with their own language, but of course, this is not guaranteed. The most frequent problems have been a lack of rigor in the classroom and inadequate knowledge of the pedagogy used at Bates and expected by the students. As a result, the Bates faculty need to be thorough in their selection and oversight of the language instructors and will want to meet periodically with them to discuss student progress, teaching methods, and grading expectations. The faculty are responsible for the final grades in the language courses as well as their own courses.

The Faculty should apply to have the program approved as a General Education Concentration. The FSA as a Concentration is both pedagogically logical and important to the student recruitment process. Similarly, the appeal of the program is enhanced when its courses can be applied toward majors and minors at Bates.

3. The Host Institution and Student Housing

A supportive "host institution" is essential to a successful program. This institution typically provides language faculty, classrooms, faculty and student housing, computer facilities, banking contacts, and the like. Past faculty directors can provide information on the host institutions they used. The Off-Campus Study Office also has information on study abroad organizations that provide "customized programs" abroad. Given the importance of the host institution, early personal contacts and written contracts are important. One faculty member, sometimes both, visits the institution and program site during the year prior to the program.

At Bates, the faculty can pay little attention to student housing. However, it is a key feature of each student's wellbeing and FSA program's success. As such, housing is an important responsibility of the faculty. On most FSAs, the students live with families arranged through the host institution or through an agency identified by them. The faculty should discuss the selection process with the host institution and the criteria important to them such as proximity to the classroom site, access to public transportation, neighborhood safety, and internet access. There should be only one student per family with no other non-family members present.

Early in the program, the faculty or the program assistant should meet individually with the students to discuss their housing and other topics of concern. This conversation is designed to make certain the family placement is working well, that the student is contributing positively to it, and that no exploitation of the student exists or is developing - financial, sexual, space limitations, or other. Similarly, the host family should be contacted early in the program to determine the host family's perspectives on the placement and student's adjustment to the living situation.

4. Field Trips and other Activities

Field trips are an inherent part of FSA programs. Some will be linked with the faculty courses; others involve travel to major tourist or heritage sites. Short trips or similar activities can be on a weekend. FSA programs often include longer "road trips" during the semester. While detailed planning can wait until later in the planning process, it is helpful to identify the main field trips prior to the production of the program brochure and the student recruiting sessions since field trips are a major attraction for some students. As attendance is required, it is wise to announce the schedule as early as possible and to space out these trips and activities so the students can plan for their free weekends.

5. The Recruitment, Application, and Acceptance Process

The programs require 25 students to proceed. Because a number of accepted students invariably withdraw after acceptance, a full program typically requires approximately 40 applications and 30 acceptances.

A creative, multi-faceted recruitment effort is essential with the outreach and recruiting by the faculty key to a successful effort. The effort begins with the creation of a brochure during the summer one year in advance of the program and extends through the admission of entering students in May prior to the program. The Bates Communications Office has a basic template for the program brochure. The Office handles many projects so it is important to contact them during the early summer, 14 months prior to the program. The Director of Off-Campus Study Programs advises on brochure content and approves the final document. He sees hundreds of such brochures a year and can provide design advice. Similarly, he is aware of certain information that must be included. Typically, faculty order 1,000 brochures to pass out to students, give to faculty for distribution in related classes, 200 for admissions, and 100 for the Off-Campus Study Office, and 100 extra.

The brochure can be serve as the webpage for the program or the faculty can develop a more elaborate set of pages. Information posters announcing and email messages sent to firstyear@lists.bates.edu and sophomore@lists.bates.edu and announcements in *Bates Today* announcing information sessions, and visits to courses taught by the faculty teaching the program, related language classes, and in other related classes. A Power Point presentation is helpful for the information sessions.

When speaking with students, it is important that faculty be candid and clear about the nature of the program. Obviously, one does not want to scare off potential applicants, but it is essential that students appreciate that the program is more than just taking four courses, that it entails interacting as a community for four months, with weekend field trips and numerous activities

outside of class. (These are all positive attributes and should be presented as such.) Similarly, students need to be aware that many of the services that they enjoy on campus will not be available, including certain foods, counseling services, and always predictable schedules. Let the students know that you will count on them to be active contributors to the program.

A time table for recruitment and admissions is included later in this Handbook. At least, two information sessions are conducted in the fall following the Study Abroad Fair with another session in January. Early applications are due at the end of the fall semester in December and regular applications in early February. The Off-Campus Study Committee is responsible for accepting students after consultation with the faculty directors. Students must have a 2.50 GPA. Recommended students with lower GPAs are often accepted, contingent on earning a 2.50 GPA during the winter semester. Students on disciplinary or academic probation are not eligible for the program. After the February deadline, applications are handled on a rolling basis if space remains available.

One of the goals of the program is to promote language study among first year students. Their participation tends to be modest because of space limits and student desire to start their Bates career on campus. New students admitted through an Early Decision application are recruited in the winter months. Students admitted through a regular application are recruited in April and early May. The application for these students requests the name of the high school guidance counselor or another individual whom the faculty may call to ascertain whether the student would have difficulty adjusting to living with a family abroad, traveling with a group, or undertaking serious academic study in a non-traditional setting. The faculty should also consult with Dean Sawyer on these applications. The faculty serve as the first-year advisor for these students.

Applications and Acceptance Forms

Program applications for enrolled and entering students are provided by the Off-Campus Study Office based on past applications and suggestions of the faculty. The applications are distributed by the faculty at information sessions and are also available from their Academic Area Assistants and the Off-Campus Study Office. Completed applications are submitted to the Off-Campus Study Office. The applications for new students are sent by the faculty to the entering student, after discussion of the program and the student's interests.

Students confirm their acceptance by returning two forms to the Off-Campus Study Office. The forms are included with the acceptance letters. The Agreement Governing Participation in a Bates Fall Semester Abroad Program and Understanding the Risks forms have been carefully crafted and reviewed by the College's attorney. The forms have several objectives, including obtaining a clear commitment to participate on the program, ensuring that students understand the nature and expectations of the program, underscoring the cultural immersion expectations, and identifying the responsibilities and powers of the faculty. They can be very helpful to the faculty during the program.

6. Post-Acceptance Forms, Passports and Visas

Faculty distribute four additional forms after the students have confirmed their plans. These forms are completed by the students, their families, and physicians (or the Health Center staff).

Student information Form
Authorization to release medical information and provide emergency care
Parental notification of Participation
Physician's report

These forms are self-explanatory, but can be critically important in terms of contacting students during the summer months, contacting parents, having passport and insurance information on hand, being able to discuss medical situations and provide emergency care, knowing whether a student has a medical condition that the faculty need to plan for, and the like. The Physicians Report can be completed by the Health Center during the spring at no charge to the student. (This is recommended since it helps get the form completed and returned to you in a timely manner.) You need to explicitly ask students to inform you of underlying health issues with the reassurance that the information is to better plan for the semester, not to deny their participation. You will want to develop a "Care Plan" with students and families when challenging health situations exist. These outline plans and ensure all parties have similar expectations.

Faculty should distribute these forms in March so they can be filled out and returned before the student leaves campus. The web page is designed so faculty can send students the link with all the forms: bates.edu/offcampus/faculty/fall-semester-abroad-program/forms Be sure to impress upon the students the importance of returning the forms to you not later than early June. Your Academic Administrative Assistant can help collect these and other documents from students. The faculty should take all of these documents on the program for possible future reference. A complete set of the documents is left with the Off-Campus Study Office.

Passports, Visas, and Immunizations

Students must have passports that are valid at least six months after the end of the program. For United States citizens, passport application and renewal forms are available online from the U.S. State Department's website: <http://travel.state.gov>. Ask students to double check their expiration dates so they can renew their passports before you undertake the student visa process. First time applicants take the form and required materials to a U.S. Post Office for processing. International students will already have passports, but will need to confirm that they are valid for at least six months after the end of the program. Students are responsible for the cost of their passports since these last beyond the duration of the program.

Student visas are generally required since most countries limit non-visa travel to 90 days for US citizens. Additionally, visas, particularly for non-US citizens, may be required also for travel to other countries during the program. Obtaining visas can be a convoluted, time-consuming process. It is often easiest to manage a group application (where possible), with the faculty member (through their AAA) collecting all the student passports, application forms, and payments and submitting them as a group to the consulate or a visa agent. Where possible, this needs to be done during the winter semester since some students may need their passports for other travel during Short Term. The key is to contact the consulate of all countries included in the program and determine the need for visas for each nationality represented. Embassy and consulate addresses in the United States are available at online at <http://www.embassy.org/embassies/>. It is helpful to work with a specific individual in the visa office at the consulate. Dean Reese, who works closely with international students, can provide advice on visas for them. The Off-Campus Study Office can provide official letters of participation for the program if needed. The program pays the cost of the faculty and student visas.

Immunizations

Information on the health issues at the program site and required and recommended immunizations are available from the U.S. Centers for Disease Control's web site (<http://www.cdc.gov/travel/>). It is important that each student be told of this site and instructed to review the information on the health situation and recommendations so they can make informed decisions on what immunizations to have prior to and during the program. The Health Center can provide the faculty and students with advice and assist students who need immunizations. It is best if faculty not provide medical advice; however, they may say what they are doing personally and what the CDC and Health Center recommend. It is College policy to not pay the immunizations for faculty or students.

7. Flight Arrangements

The program fee includes the cost of a round-trip ticket from the U.S. city of departure. This is usually Boston, but may be Portland if the program includes some initial time at Bates. Most faculty research their ticket options online and then utilize Dube Travel, 250 Center St., Auburn, ME; 784-2916 for the actual purchase. Ticket purchase through Dube Travel is recommended even if slightly more expensive. In addition to being able to invoice Bates directly, it can be helpful to have a local agency that is able to make flight changes, and can work individually with students who do not take both legs of the group flight or who withdraw from the program after tickets have been purchased, etc. Ask for a Dube agent who works with Bates.

Before purchase, you will want to confirm with each student whether they will travel both ways with the group. (Initial travel with the group is required unless the student is traveling from another country.) Variations to the group flight can be a time consuming process so faculty will want to leave all such arrangements between the students and travel agency. Students who purchase their own tickets between their home and the program are reimbursed for the cost of their flights, up to the cost of the group flight, with receipts.

8. Program Assistant

A program assistant can be very helpful to the program if the budget allows for one. The assistant, generally closer in age and style to the students, can help in many capacities: as a social coordinator and arbitrator, as a runner of errands, as a companion to students with special needs or in special situations, as another source of maturity and leadership in group travel situations, as a cultural advisor to students. Past assistants have been graduates of Bates a few years out and living abroad or in graduate school, and former foreign teaching assistants at Bates. The Program Assistant is paid approximately \$5,000 (subject to special circumstances) from the program's budget. The consultant's fee is increased so he or she can pay for housing, food, health insurance, and airfare, if needed.

Heather Ward, Assistant Director of Accounting, can explain the procedures for hiring a program assistant. The assistant is hired as an independent contractor hired by the program. The assistant is not hired by the College and is not a College employee. A sample "Program Assistant Contract Letter" is provided in the "Additional Information for Faculty" web page.

Key considerations in selecting a Program Assistant are language skills, previous study abroad experience, maturity, comfort in operating in uncertain or new situations, and an ability to work effectively with both students and faculty. Gender balance is an interest if both faculty are male or female. In the past, the selection committee has included the faculty leading the program and students who are past participants on FSA or other study abroad programs. Candid conversations should be held with the Program Assistant regarding the importance of respecting confidentiality, supporting faculty decisions once they are final, an absolute prohibition on amorous relationships with students, and the ability to work with a minimum of supervision. Assistants who graduated the previous June have been excellent in some cases (and available to help in the spring) and problematic in other cases. The problems have been an inability to recognize that he or she is now an employee, accountable to the faculty and separate from the students' personal lives.

9. Budget Planning, Reporting, and Management

Budgeting and record keeping major responsibilities since the budgets exceed a quarter of a million dollars. Every program and budget is unique; however, many issues are similar.

Each FSA program is allocated up to 50% of each student's fall semester comprehensive fee. The budget covers each student's cost of roundtrip transportation from the U.S. city of departure, tuition, room and board at the program site, and the transportation, room and board costs on official field trips and excursions, and visa costs, if any. It does not cover student personal expenses and personal travel. The College subsidizes the program by paying Bates faculty salaries and benefits separately, by ignoring the fact that many participants receive aid and thus pay less than the full comprehensive fee, by not assessing any indirect costs to the program, and by not assessing a contingency fee.

It is important to be realistic, even pessimistic, when developing the budget to avoid being underfunded or having to constantly worry about expenditures while abroad. For example, assume no improvement in exchange rates and that one confirmed student will withdraw in May and another, previously enthusiastic participant will withdraw on August 1 because of a family illness, changed major, transfer to another college, etc. Both happen almost every year. More positively, once abroad you may find many prices are flexible, with lower prices for group tickets, travel during off-peak times, and tickets purchased in advance. You can better investigate these options once abroad.

As you develop a budget, you will discover quickly the advantage of having 25 students on the program. Many of the program costs are fixed, such as printing the brochures and faculty housing, and more students provide a larger base to absorb such costs. You should meet with Heather Ward in the Financial Office as you develop your budget and for advice on accounting procedures. The Financial Office can also discuss the schedule and procedures for obtaining foreign exchange, fund transfers, and obtaining a Bates College credit card with a large limit for use on the program. You should arrange to have as many expenses as possible paid directly by Bates prior to the start of the program – airfare, tuitions, housing, etc. Program funds may be advanced to you either by wire or by Accounts Payable check for expenditures not directly paid by the Bates Financial Offices. Proper record keeping and receipt verification will clear the advance from your vendor record file in the Financial Office. Depending on the situation, it may be necessary to take a large amount of cash (\$5,000+). Exchange enough money upon arrival to cover the first days of the program as you and the students get settled.

Record keeping tends to be a combination of low and high tech: an ever present pocket notebook in which each expenditure is recorded, a spreadsheet where these expenditures are recorded in their various categories on an almost daily basis, and an accordion file where the receipts are saved. For peace of mind and program planning, it is important to monitor the expenditure rate at weekly or two-week intervals.

As you develop the budget, you will determine the students' living stipend and the method of its disbursement. Usually these funds are distributed at two week intervals with the students signing to confirm receipt of each distribution. These "stipend sessions" provide an opportunity to share cost saving ideas and for students to alert you of lower or higher costs than anticipated. Unfortunately, some students may use these sessions to question the overall budget and the amount the program receives from Bates. You should never discuss these topics with the students. A little answer simply leads to additional questions. Refer the students to Dean Sawyer if they persist.

Post-Program Return of Funds, Bates and Federal Reporting

At the conclusion of the program, all unspent funds need to be deposited at the Financial Office into the program's account within a week of returning. Any expenditure for post-program activities must have been included in the program's original budget. Student expenses that have been paid for by program funds, such as medical costs, need to be recovered from the student or through health insurance payments. A complete financial accounting, supported by receipts, is submitted to Heather Ward in the Financial Office in January after the conclusion of the program. (Use of the categories below works well for the Financial Office.) Unused funds are the property of Bates College and help offset the subsidies discussed above, fund the College's contingency fund for study abroad program emergencies, and help maintain institutional support for future FSA programs.

The need for a foreign bank account creates the need to submit several reports to the U.S. Internal Revenue Service after the program. The Financial Office will review and guide you through these obligations during the planning process. While a new experience for most faculty, the forms are not complicated and are filed routinely by thousands of individuals every year. There is no fee for these submissions. However, faculty are responsible for the extra costs if they use an accountant who charges extra for the submissions. The reports include:

1. Schedule B (Form 1040A or 1040), Part III, which is filed with your personal income tax return.
2. If the aggregate value of all your foreign financial accounts exceed \$10,000 at any time during the calendar year, you are responsible for FBAR (Foreign Bank and Financial Accounts) reporting. Additional information on this reporting requirement is online at: http://www.irs.gov/pub/irs-utl/IRS_FBAR_Reference_Guide.pdf The report is filed electronically through the website: <http://bsaefiling.fincen.treas.gov/NoRegFBARFiler.html>
3. In addition to the FBAR reporting, if you have foreign financial accounts that exceed certain thresholds (\$50,000 to \$150,000) at certain times of the calendar year, you must report those assets to the IRS on Form 8938 and file with your personal income tax return. (This form is available through the IRS and is included in tax reporting software such as TurboTax.) Once again, Heather Ward can explain these reporting requirements in greater detail.

In addition, US Internal Revenue Service regulations require that the College report the subsidy of spouse/partner and children travel and other incremental costs as income, which is added to the faculty member's taxable wages and W-2 form.

Program versus Personal Expenses

Money management is complicated by the faculty's need to manage both program and personal funds and the need to distinguish between program and personal expenses. There is an underlying desire to be fair yet frugal, to ensure that participation does not result in financial hardship for the faculty, yet not to have the program pay for expenses that are personal responsibilities. Trust is at the center of this balancing act, along with the assumption that faculty have the good sense to not put their career in jeopardy for relatively modest monetary benefit.

The program pays for faculty visas and roundtrip travel from Lewiston to the program site, the costs associated with participating on all field trips that are integral to the program, and for housing, reasonable food and local travel expenses for the faculty member, and her or his spouse/partner and dependent children, if any. Dependent children are defined as pre-college age and still living at home full time. (This support for dependent children and spouses/ partners allows for participation by younger faculty. The absence of this need does not yield program funds for alternative personal expenses.) The program also pays for a cell phone for each faculty member, including long distance calls to Bates. Conversely, passport fees, personal expenses (other than food, housing and local transportation), immunizations and other medical expenditures, and non-program related travel, recreation, entertainment, and cell calls are the responsibility of the individual faculty member. Educational expenses for family members are the responsibility of the faculty.

Sometimes the distinction between a program and personal expense is a fine line. Since the program pays for reasonable food costs for the family, occasionally eating out inexpensively in place of cooking is a program cost. However, an expensive, celebratory meal without students is a personal expense. The goal is to be fair, consistent, and to avoid practices that appear to abuse the trust that holds the entire undertaking together. Faculty may contact Dean Sawyer or Heather Ward to discuss program versus personal responsibilities if uncertain or uneasy. For the sake of accounting clarity, the faculty should charge personal expenses to separate credit cards and keep separate cash.

Typical budget categories

Pre-program phase:

- Planning trip to program site -U.S., international, on-site transport, lodging, food, gifts, etc.
- Recruiting expenses - brochures, mailing, telephone, copying, food at information sessions
- Entertainment for participants - generally a pizza party or cookout in the spring

On-campus session at start of program (if one is planned)

- Food
- Transportation/pickup and travel to departure airport
- Educational expenses
- Group Entertainment

International transportation:

- Roundtrip airfare
- Roundtrip transportation from airport to site
- Other in-transit costs

Student room and board:

- Payments for host families
- Reception/gifts for host families
- Food and housing during non-host family time
- Commuting expenses for students, if any

Educational Expenses (non-staff)

- Tuition and facilities costs
- Books and supplies sent from the U.S. and shipping costs (plan ahead & send at lower cost)
- Photocopying
- Books and supplies purchased on-site (students pay for own books)

Field trip and cultural outings expenditures:

- Transportation
- Lodging
- Food
- Entry fees

Communications:

- Faculty email/internet access (borrow laptop from Bates ILS if needed)
- Student email/internet access
- Student cell phones with limited local calls (They can add minutes at their expense.)
- Telephone & Fax
- Postage

Staff:

- Housing for Director and family, if any.
- Food and related living expenses for Director and family, if any.
- Housing for second Bates faculty and family, if any.
- Food and related living expenses for second Bates faculty and family, if any.
- Mailing materials abroad (Sometimes students carry program materials to reduce the cost.)
- Language faculty salary and taxes
- Visiting lecture honoraria
- Program assistant salary
- Program assistant housing
- Program assistant food, related living expenses, and insurance costs, if any.

Other:

- Minor medical expenses (Note students and faculty are responsible for their medical costs.)
- Entertainment expenses
- Taxi and city transportation

10. Safety and Risk Management

Risk management is central to the planning and operation of any study abroad program. The health and welfare of the individuals on the program, students and faculty, is always the top priority – ahead of the budget, the academic program, that day’s schedule, the popularity of an individual student or faculty member, feelings of a host-family, etc.

Most risks can be avoided through careful pre-trip planning, the provision to the participants and their families of information about the program and host country, and with routine caution and common sense when on-site. In litigation involving colleges and universities, the key standard is whether the institution and faculty “acted reasonably and prudently” for the given situation. If ever in doubt, it is best to be safe and spend the extra money. Students, like the rest of us, manage differences best when prepared in advance for them, whether the difference is squat toilets, leering men, crazy truck drivers, bugs in the shower, or long bus rides.

In recent years, vehicular accidents, with students as passenger or pedestrians, have been identified as the most frequent cause of student injury and death on study abroad programs. Students must be informed of these vehicular dangers and other risks particular to the program location. There is also evidence that sexual harassment and assault occur at higher rates abroad.

Health and Safety Advice and Protocols in a Timeline Format

Program Development Phase

Consider health and safety issues when you select your host institution. Is it in a safe neighborhood? Can students safely move from it to areas of interest in the city? Is there safe transportation from the institution to the students’ home stays? Are there crime issues in the neighborhood? Would the institution be willing to discuss safety pre-cautions with the students upon arrival? Explicitly ask these questions.

Review US State Department consular information and CDC information on the program country and locations of field trips. This information is available at <http://travel.state.gov/> and <http://wwwnc.cdc.gov/travel/>

Review information regarding the program’s location on Europ Assistance’s webpages. Access to Europ Assistance’s information and additional services is provided through ACE Insurance, the College’s foreign casualty insurance provider. Europ Assistance provides information for the location of your course, including recommended hospitals, and 24/7 emergency assistance through 34 assistance centers stationed around the world with access to 850,000 medical and technical professionals. You register at: <https://www.acetravelapp.com>, enter your Bates email address, and the College’s policy number PHFD38454419. You and the students use the “Contact Us” tab to contact their center in the United States if an issue arises during the semester.

Review the program, health and CDC immunization recommendations with Christy Tisdale, Director of the Bates Health Center. Discuss with Christy Tisdale the types of medical support available from the Bates Health Center.

Discuss local safety and health issues the with host institution, including:

Selection of taxi and bus companies

Selection of home stay families, safety within the homes, the neighborhood, and transportation to and from the program, having an “emergency” family available.
Access and protocols for working with English speaking physicians and counselors
Access and protocols for emergency hospital care and payment.

Plan on both faculty being on-site at all times when the program is in session. One faculty member should remain on-site during weekends and vacation weeks to serve as an emergency contact person.

Recruiting Phase

Include addresses for the US State Department and CDC websites in brochure.

Do not overpromise access to medical care, especially counseling services. The program may not be appropriate for some students.

Tell all the students with health issues that they should speak with you in private or with Christy Tisdale to assess whether the program is suitable for them at this time in their lives.

Start instilling the idea that this is a group venture, more than just four courses. Tell students that they should remain on campus if drug use or alcohol consumption are important to them.

Speak privately with any student whom you think might be a disciplinary problem on the program or might not understand the group nature of the program. Consult with the Dean of Students Office regarding individual students, if desired.

During the Spring, after Acceptance

At a group meeting, the faculty should review your ambitions for the program, including your expectations for their help and cooperation. You can use the “Agreement of Participation” form to review key behavior expectations, including those related to student safety. Safety topics include the responsible use of alcohol, prohibition on drug use and rental cars, the danger of vehicular accidents as passengers, pedestrians, and bike riders, the increased risks of sexual harassment and assault.

You will want to point out that many of the support systems available at Bates do not exist abroad. In this light, you should encourage students with special needs, taking medication for psychological conditions, with any kind of treatment for physical or psychological issues to discuss them with you in private so you are aware of their needs abroad. In some cases, you may want to ask the student to discuss the suitability of her or his participation with Christy Tisdale. Alternatively, you can tell the student that you are going to ask Christy Tisdale to speak with the student. This is also a good time to discuss the students’ housing arrangements. The objective is to avoid surprises and conflicts once off-campus.

To help with this process, the Off-Campus Study Office will share your list of accepted students with the Health Center for review. Health Center staff will discuss the suitability of participation with students of concern to them.

Students complete the “Student Information” and the “Medical Release” forms. As noted previously, this information is important to collect before students leave campus. In addition,

each student must submit a “Physicians Report” which the faculty should review for potential issues that may need discussion with the student.

All students and faculty must have health insurance applicable for the study abroad program locations, including field trips. The Bates student health insurance that many students use applies abroad. Many family health insurance policies also apply, but monthly policies can also be purchased. Individuals are responsible for this insurance and for their medical expenses.

Pre-Departure Phase

Plan your orientation program for the first days, with the most critical items – travel safety, alcohol use, sexual assault, crime avoidance - on the first day of arrival. Even though students may resent it, you need to stress that they stand out, are seen as targets of opportunity, are assumed, are assumed to be wealthy, and as American woman, to be sexually promiscuous. In planning this orientation, you should assume students retain nothing that was discussed prior to arrival. If it is important, repeat it.

Discuss the orientation session with the host institution ahead of time so they can participate and provide suggestions. Ask if host country students are available to discuss safety issues with your students at the orientation session. Ask whether there have been recent crimes at the institution or the neighborhood that you or the students should know about.

Have all students arrive at the airport on the same day, within a certain time period if flying independently.

Provide to students and for their families – your and the host institution’s contact information, departure and return flight information, and other information of interest.

Arrival Phase

Conduct Orientation.

Emphasize the program is a group undertaking, that you need each student’s help and cooperation for it to be a success. Discuss the need for a buddy system to account for people and that you will ask for their help with some tasks, such as luggage handlers, especially on field trips.

Discuss how standards of behavior outside of class need to be high, that they are guests in the country. Discuss that, in contrast to Bates, there is no support system in their city, that they will likely stand out, and be seen by some as a target of opportunity, assumed to be wealthy, and not protected by local social networks. Repeat this discussion with individual students if you feel this would be helpful.

Depending on the location, it may be necessary to warn women of more frequent “sexual hazing” than in the United States, that as American women, they will be assumed to be sexually promiscuous, that they will be seen by some as targets of opportunity not protected by informal social networks. Women from the host country should be enlisted to provide safety advice and how to respond in threatening situations

Remind students that provocative clothing, excessive alcohol consumption, and being alone all increase their vulnerability to crime, especially at night. In some settings, these conditions actually invite crime as spotters call other gang members. Point out that large men are not immune from these risks.

Be sure the students have functioning cell phones with key information entered. This includes your telephone number, the institution's address and telephone number, their host family's address and telephone number, a recommended taxi company, the local equivalent of 911 and any other important local numbers.

Urge students to follow their instincts, to always have taxi money with them, and to use it if uneasy in any way.

Remind the students that students die and are maimed for life on study abroad programs every year, with drowning and vehicular accidents the most deadly. Bates students while studying abroad have broken arms, pelvises, and legs, been robbed countless times, been physically assaulted, been sexually assaulted, and died.

Explain that you need the students to bring issues of concern to you so you can discuss them with the student and decide with the student how to manage the issue. Emphasize that you understand the importance of their confidentiality and will respect it.

Have personnel or students from host institution and/or local police speak about strategies for reducing exposure to crime in the city and to discuss any recent incidents of which the students should be aware.

Home stay orientation topics (hold off on these until students move to home stays)

Review home stay expectations and the need for students to contribute and to allocate time to their host family.

Remind the students to avoid creating tempting situations, such as leaving money on bureau tops, laptops outside, female bedroom doors ajar, etc.

Remind the students of your need for instant reports of any incidents even if not serious and to follow their instincts.

Discuss transportation safety to and from home stay. (It may be necessary to pay for taxis at night or both ways, change housing, etc.)

Non-orientation items:

- Confirm access and protocols for accessing English-speaking doctors and mental health counselors.
- Confirm protocol for taking a student to a hospital for emergency care, visit the hospital to confirm what is needed to treat a student (such as a list of the students with a letter from the host institution, discuss how payments are handled).
- Confirm protocol for selecting bus companies for field trips.
- Call the Off-Campus Study Office at Bates to confirm local telephone numbers and other contact information (yours and the host institution's).
- Make sure host institution knows how to contact the Bates Off-Campus Study Office.
- Register students with US consulate and local police unless advised otherwise by host institution.

During the Program Phase (after the first week)

Ask students to bring any safety or health concerns to your attention. Any inappropriate sexual advances require immediate removal of the student from their home stay housing.

Have a meeting to discuss their home stay situation with each student two weeks after they move in; topics include food, sense of security inside the home, transportation to and from the home, their contributions to the family, living stipend issues.

Confirm that students have completed their information cards and carry emergency taxi money on them.

Remind students of the need to complete an "Independent Travel Plans" form" whenever they travel independently with as much of information, including dates, and contact information as possible. The form is online in "Forms for Accepted Students." This can be managed by the assistant, if desired.

Be cautious when renting buses and other vehicles for field trips. Ask the host institution for advice and always hire the most reputable company. Trust your instincts regarding the driver. If you are not comfortable for any reason, insist on a replacement even if you must pay them both. Whenever possible, you should rent cars and/or charter buses only from reputable national or transnational companies. It may be necessary to spend an extra night rather than travel at night on a certain road. Similarly, it may be necessary to pay for two students to travel together, even though only one needs to go, or to pay the commuting costs of a student who has a difficult or distant journey from the host family to the program site.

Always follow the basic rule: When in doubt, be cautious, take the extra time, spend the extra money.

Safety and Travel Precautions for Students. If you are an American or dress like one, some people will consider you a walking bank or advocate of United States foreign policies. This is true even if you do not consider yourself wealthy and oppose US policies. Obviously, it is your responsibility to act in ways that minimize your risks. Common sense precautions are to:

- Keep a low profile in demeanor and dress by observing local customs and laws.
- Avoid clothes with U.S. logos, college seals, and the like.
- Make covers for your guidebooks out of paper bags or other nondescript material.
- Speak the local language whenever possible.
- Use an "under-your-clothes" money pouch and be discreet with it -- do not pull out wads of cash in public places. Men should never put their wallets in their back pockets.
- Never leave your backpack, phone, laptop unattended. Five seconds is all it takes to lose it.
- Carry some cash in reserve while traveling - tape money in your backpack.
- In some settings, illegal taxis prey on foreigners. It is better to call a taxi in these cases.
- Photocopy your passport and plane tickets and keep them separate from the originals. You might scan these documents and store them on a flash drive.
- After dark or in insecure areas, travel with a buddy or two. (1+1 =4, two people together are four times safer)

- Travel with at least one other person and leave your itinerary with a friend or director.
- Follow the same precautions that you would traveling in the U.S., e.g. do not enter an empty train, bus, or dark street at night, cover your name tags, check the adequacy of your money before going out, be discreet with your money, phone, other valuables.
- When necessary, spend the extra money if that helps avoid a threatening situation.
- Do not carry, look after, or take other responsibility for any package or suitcase on behalf of a stranger or "new friend." It could contain contraband or explosives. Similarly, do not drive somebody else's car across a national border.
- Avoid, whenever possible, American "hangouts," American embassies, controversial discussion in public places, protests and marches, and areas of religious controversy.
- Recognize that road accidents are the greatest cause of death and serious injury for U.S. travelers abroad. Fatalities caused by cars, buses, motorcycles are up to 40 times higher in some countries. Bicyclists and pedestrians are especially vulnerable. Always assume that cars have the right of way, especially at crosswalks.
- Do not make yourself vulnerable through excessive alcohol consumption - in any context.
- Trust and follow your instincts. If you sense a situation or person is unsafe, it, he, or she probably is.

Additional information is online at: <http://www.studentsabroad.com/>

11. Responding to and Reporting Incidents

The health of the student is top priority regardless of cost and inconveniences to the rest of the group. One faculty member should focus on managing the incident while the other faculty member attends to the needs of the group.

Incidents are generally of three types – a simple criminal act such as a robbery, an explicit medical event such as a broken leg, or a confidential event such as a sexual assault of some sort.

The response to a “simple” criminal act depends, of course, in the nature of the event. However, you may find that students are deeply unsettled even by relatively small incidents. You should discuss response options with the student, reassure them, work to re-engage them in the program. The Fall Semester Abroad Programs are covered by the Clery Act which requires colleges and universities to collect crime statistics and report them to the Federal Government. For this reason, you should report any criminal activity to Tom Carey (tcarey@bates.edu), the head of Security at Bates. (Please copy Dean Sawyer.) Security will follow up with a form that needs to be completed for each event.

For an explicit medical event, obtain appropriate medical care quickly. Have the student contact her or his family as soon as possible. If not possible, the faculty member should call the family so it gets the facts from you. Provide only known facts about the incident since conjecture about causes or other aspects can be damaging if incorrect. Preferably the identity of the student can be withheld from the rest of the group until after her or his family has been contacted. If the students know, ask them not to spread the information until the student’s family has heard from the student. Inform Dean Sawyer of the incident and call Christy Tisdale to review the health care response.

For a confidential event, it is important to seek professional help for the student and not try to manage the situation on your own. This may include contacting Christy Tisdale, Director of the Bates Health Center, for advice at any time of the day or night. If a sexual harassment or assault, you need to contact Gwen Lexow, the College’s Title IX Coordinator, as soon as you can. She is the point person for responding to sexual assault as required by Title IX and can provide advice

on responding to the situation and will want to talk with the student about the incident and response options. You should treat information on sexual assault as a “hot potato” which you cannot drop and must pass on immediately.

It is essential that the student be the one to determine whether any information is shared with her or his family or with the rest of the group. The rest of the group must be alerted to the existence of the risk if it applies to them, but not that someone on the program has already been victimized. Recognize that the student may need time to process the incident. If information on the event is shared with other students, some of them may also need special assistance. Once again, confidentiality within the group is essential.

FERPA and HIPPA laws protect student privacy; however, they provide great latitude in the case of an emergency. Faculty may share information with appropriate Bates employees if a student is perceived to be a danger to themselves or others or if there is a significant health, safety, or security situation affecting the entire program. Similarly, you can discuss a student’s information with other appropriate parties if it is necessary to prevent or lessen a serious and imminent threat to the student or other individuals. The laws provide wide latitude as long as you believe you are acting in the best interest of the student or other students on the program.

Reporting and Consultation Contacts:

Bates Security +207-786-6254 (This office is staffed 24/7 and can reach the individuals listed below.

Stephen Sawyer: ssawyer@bates.edu, +207-786-6223 wk; +207-783-6549 home

Christy Tisdale: ctisdale@bates.edu, +207-786-6199 wk, +207-933-2925 home

Gwen Lexow, glexow@bates.edu, +207-786-6445. www.bates.edu/sexual-respect

Tom Carey, Director, Bates Security: tcarey@bates.edu , +207-786-6254

Paul Menice, Clery Act contact, Bates Security, pmenice@bates.edu

12. Insurance Coverage and Emergency Assistance

Insurance falls into four broad categories: (1) personal health, (2) liability including automobile accident liability and collision, (3) rental vehicles, and (4) emergency assistance.

Personal Health Insurance The faculty health insurance policy provided by the College through Aetna provides emergency coverage in most countries. Faculty should contact their insurance provider to confirm insurance abroad if they receive insurance through a different policy. Faculty with routine, non-emergency medical needs should check to see whether these are covered abroad, whether covered by Aetna or another company. Similar to students, the faculty should take the telephone and policy numbers of their health insurance policy and their primary physician with them. (Be sure to take the regular long-distance numbers since toll-free numbers do not apply from abroad.)

Bates students are required to have comprehensive health insurance coverage, either through Bates or their family. The Bates plan covers emergency care abroad. Claim forms and other information may be obtained from the Cross Insurance web pages:

<http://www.crossagency.com/bates> If needed, you can call Doris Ducharme, the insurance coordinator in the Health Center, tel. +1-207-786-6199, for advice on the insurance process. Students with their own insurance must confirm that it applies abroad. Students provide the name of their insurance company, policy number, and telephone number on the Student

Information and Health Form. Companies that provide policies specifically for study abroad are listed on that form.

In most cases, it is necessary to pay for medical expenses out of personal or course funds and then to seek reimbursement through the injured individual's insurance company. The key to successful reimbursement is thorough documentation, with the patient's name, date, procedure(s), administering physician, clinic or hospital address, payment, and exchange rate on every bill. Payment by credit card confirms the payment, date, and exchange rate.

Liability Insurance The College's General Liability and Foreign Liability Insurance policies cover Bates employees participating on College-sponsored activities. These policies are also purchased through Cross Insurance. Coverage includes general liability, contingent automobile accident liability and physical damage as well as employment related injuries. The contingent automobile accident liability coverage applies excess over and above the primary auto liability coverage that is purchased at the time of the rental.

Rental Vehicle Insurance It is best to rent buses with professional drivers or to travel by public transportation. However, if renting a car or van abroad, you should purchase liability insurance that is at least the compulsory minimum required in that country. If in doubt, purchase \$500,000 of auto liability insurance. To ensure protection under the College's policy, include the College's name and address (2 Andrews Road, etc.) on the rental contract, along with your name. You do not need to purchase auto physical damage insurance, also known as collision and comprehensive coverage, from the local agency since the College's Foreign Liability Policy includes "Hired Auto Physical Damage" insurance which provides up to \$50,000 for any one accident or \$50,000 in any one policy period of physical damage to a rental vehicle in the event of an accident. Employees of the College are considered insured drivers. Students may drive only if an emergency exists which prevents the hired driver or college employee from driving. When renting in the United States, you should decline insurance coverage for Damage Waiver, Personal Accident Insurance, and Supplemental Liability Protection.

Emergency Assistance As previously noted, students and faculty are covered by Europ Assistance when on Bates sponsored program abroad. This service is provided by ACE Insurance. Europ Assistance maintains a worldwide network of health professionals, hospital contacts, and rescue teams. Services include financial guarantees to hospitals for emergency care, identification of physicians and hospitals, emergency consultation and if needed, evacuation for the patient and one family member to a recommended location, and a visit by a friend or family member to an employee who is alone and hospitalized for more than seven days. The policy also provides emergency for the repatriation remains. In addition, the policy provides assistance in locating legal representation abroad, obtaining emergency bail bonds, and in replacing lost documents. Whenever possible, it is best for the faculty member or student to contact Europ Assist before incurring a cost or service that it will pay for, such as a medical evacuation.

The best contact information for Europ Assistance is in the ACE Travel App that you and students should download to your phones. If calling from the United States, the number is +1-800-766-8206; if abroad, the number is +1-202-659-7777, call collect. The plan number is 01-SP-585. The Bates policy number is PHFD38454419 (needed to download the App). The phone lines are staffed 24/7.

13. Cultural Adjustment

Soon after your initial orientation, you will want to forewarn students about the phases of cultural adjustment they (and you) are likely to experience. It can be helpful to review the stages at various times during the semester. These phases can be broadly defined as:

- *Initial fascination* -- a state of excitement when the new surroundings seem glamorous and exotic, and students feel that they are the focus of attention.
- *Culture shock* -- the initial fascination with the new setting and culture fades, students seek out the familiar, but it's not there. Homesickness and feelings of isolation are common as the novelty wears off but the difficulties remain. Often this is marked by boredom and a lack of motivation to engage in the host culture, language, and life. Unresolved personal issues often resurface during this stage.
- *Adjustment period* -- after this initial down time, lasting from a few days to a few weeks, adjustment takes place and students settle in. Language skills improve, and it is easier to communicate basic feelings and ideas without fatigue. Students may develop a small group of friends which helps them feel integrated, but it can be a time when comfortable days offset by lonely ones.
- *Integration and Acceptance* -- when students are finally at ease with their academic and personal lives and with the language, they start to relax and to feel at home. They find ways to deal with the deeper differences between themselves and their hosts; they may choose to adopt aspects of the host culture into their own lives.
- *Return anxiety* -- the thought of leaving new friends and the community raises anxieties. Students begin to sense how much they have changed due to their experience and may feel apprehensive at the thought of returning home to friends and family who may not understand these new feelings and insights.

14. Fall Semester Abroad Program Planning Timeline

Several years in advance of anticipated program.

Consult with Dean Sawyer, faculty who have led prior FSA programs, department/program chair and colleagues, review the Off-Campus Study web pages for Faculty, Fall Semester Abroad Program. Discuss with the chair of your department/program impact of being off-campus for that fall semester.

Submit proposal based on the application form that is online.

Receive approval from Off-Campus Study Committee in consultation with the Dean of the Faculty. Further discuss department impacts with department chair.

Recruit second faculty member if not identified in original proposal.

Year Prior to the program

Travel to program site, meet with host institution to discuss language faculty, support

and services they can provide. (Program budget pays for this.)

Construct an initial budget, consulting with Heather Ward in the Financial Office.

Summer before the program

Contact the Bates Communications Office regarding the text and design of program brochure. Design webpage (which can be the brochure). Dean Sawyer will assist.

Working with your AAA, reserve rooms for mid- October, post-Thanksgiving, and mid-January information sessions, identify faculty and classes to contact with program information.

Discuss recruiting plans with faculty who have run similar programs.

Develop applications, based on past applications on Off-Campus Study Program website. The Off-Campus Study Office will assist.

October Attend Study Abroad Fair sponsored by Off-Campus Study Office. Ask students who participated on past FSA programs to join you.

Discuss the program with faculty in related fields, provide them with brochures.

Hold information session. Two weeks prior to session - develop posters for session and inform Off-Campus Study Office of time and location so it can distribute brochures to first-years and sophomores. A few days prior to session – send email message to “announce,” and “first year “and “sophomore.” Send message to Student Activities Office for *Bates Today*.

Propose faculty courses online.

Propose the program as a GEC if not already approved.

November Hold second information session, with posters, emails, announcement in *Bates Today* and reminders to key faculty.

January Review early applications.

Hold a third information meeting with posters, emails, announcement in *Bates Today* and reminders to key faculty.

Respond to inquiries from students admitted early.

Determine visa requirements and procedures for the country(ies) of study

February Regular Applications due. Review applications. (Expect a 20% “melt” rate from the time acceptance letters are sent to the program’s departure.)

Letters of acceptance/rejection sent by Dean Sawyer with “Agreement Governing Participation” and “Understanding the Risks” forms. These forms are returned to the Off-Campus Study Office by late February.

Receive final approval to conduct program if 25 or more students confirm their participation.

Contact non-responders to determine their plans.

If needed, travel to program site during break. (April break may be equally appropriate time.)

March Confirm with Admissions the number of entering students desired, if any. (Need to “over admit” as these numbers will also decrease.)

Meet with participants to get to know faculty, other students, ask questions, distribute their three forms (and emphasize need to complete quickly), discuss need for passports (with program +six month expiration dates), visas, and health insurance, announce schedule for “summer mailings.” Offer to meet individually with any student who has concerns or special health issues.

Similarly, ask students with learning differences to discuss them with you individually, noting that there may be limits to the amount of accommodation available abroad.

Meet with international students to get them working on visas, travel plans.

April Respond to inquiries from newly admitted new students, if the program has space.

Discuss language courses (and confirm status of faculty courses) with Registrar.

May Continue admissions effort with new students, if included.
Meeting with program participants on campus for Short Term. Confirm receipt of Student Information and Health forms with all the needed information, discuss passport and visa issues (Do not take anything for granted as there is no room for error.)

June Summer mailing with tentative schedule, other information.
(Always send copies of such mailings to Dean Sawyer so we have a copy on hand to respond to telephone inquires and for our records.)

Give copies Student Information and Medical Release (including copy of the students passport information page), Parental Notification, and Physicians Report to Off-Campus Study Office.

Work with Heather Ward on budget and money management procedures, arrangements for wiring money, credit cards, etc..

Confirm faculty health insurance coverage through Human Resources (if on Bates plan) or through sponsoring company if a separate program.

- July Final mailing with flight information, schedule for the semester, list of participants (copies to Dean Sawyer).
- August Departure. Refer to orientation content and schedule in the Safety and Risk Management section.
- Sept/Dec. Weekly status reports to Dean Sawyer. One or two sentences are adequate if the program is going smoothly.
- January Program evaluation by Off-Campus Study Office, financial accounting, program report by faculty.

15. Bates Contact Information

Web Page: www.bates.edu/offcampus/faculty

Bates Security: +207-786-6254 (staffed 24/7)

Bates Off-Campus Study Office: +207-786-6223, Fax +207-786-8331

Stephen Sawyer: ssawyer@bates.edu , +207-786-6223 wk, +207-783-6549 home

David Das: ddas@bates.edu, +207-782-3101 home

Heather Ward: hward@bates.edu, 207-786-6444

Tom Carey, Director of Bates Security: tcarey@bates.edu +207-786-6254

Bates Security: +207-786-6254 (open all the time)

Dean of Students Office: +207-786-6219; tgroundie@bates.edu

Bates Health Center: +207-786-6199, Christy Tisdale home +207-933-2925

Gwen Lexow: glexow@bates.edu, +207-786-6445 www.bates.edu/sexual-respect

Human Resources Office: +207-786-6140

Registrar's Office: +207-786-6097, Fax +207-786-8350, registrar@bates.edu

Mike Parkin or Lisa Farrington at Cross Insurance: +207-783-8591

Centers for Disease Control: <http://wwwnc.cdc.gov>

Listing of country embassies in the United States: <http://www.embassy.com/embassies/>

United States Department of State emergency number: +202-647-5225 or <http://travel.state.gov>

Europ Assistance: +1-800-766-8206 (within the US & Canada), +202-659-7777, call collect outside the US & Canada)