

## Fall Semester Abroad (FSA) Program Planning Handbook

This guide is designed to assist faculty who are planning and leading a Bates Fall Semester Abroad Program. It contains information on:

1. Program Planning and Management
2. The Program and Courses
3. The On-Site Partner and Housing
4. Excursions
5. Recruitment, Application, and Acceptance of Students
6. Post-Acceptance Forms, Passports, and Visas
7. Flight Arrangements
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9. Safety and Risk Management
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*Disclaimer: Please note that this document is continually being updated. This version is from January 2020. Please contact the Center for Global Education at Bates College with any questions.*

## 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 Center for Global Education has developed for the Fall Semester Abroad Programs: <https://www.bates.edu/global-education/faculty/fall-semester-abroad-program/>. 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 Darren Gallant or David Das, 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 **Center for Global Education** 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 **Communications Office** will help design and produce the brochure. The **Accounting Office** will help with money management, budgets, and accounting procedures. **Academic Administrative Assistants** provide secretarial support.
- With consultation by the Associate Dean & Director of Global Education, carefully select a fully professional study abroad organization, 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 organization.
- 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.

## **2. The Program and Courses**

The academic program consists of four courses, usually an initial intensive language course followed by three courses. Some programs have offered a second language course and two thematic courses, but others have included three thematic courses. It is also possible to offer an academic internship opportunity as provided by an on-site study abroad organization.

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 to be reviewed by the Center for Global Education and Dean of Faculty.

Once a program is approved, the faculty submit proposals for their two-three 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 are important to students' experience, learning, cultural immersion, and safety. 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 with these courses 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 courses they don't teach as well as their own courses.

The Faculty should apply to have the program approved as a General Education Concentration (GEC). 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 On-Site Partner and Housing**

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

Housing 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 study abroad provider or host organization. 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. Excursions**

Field trips are an inherent part of FSA programs. Study abroad provider partners can organize these, make suggestions, create itineraries, vet agencies, and provide resources. 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 20-25 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 flyer/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 is a resource for professional looking flyer/brochures. 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 the Center for Global Education advises on brochure content and approves the final document. They see 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 300 brochures to pass out to students, give to faculty for distribution in related classes, 50 for admissions, and 100 for the Center for Global Education, and 150 extra.

The brochure can be a helpful handout to direct students to a more elaborate website. The website should be developed well in advance in cover all topics relevant to students and families. The Office of Communications can set up a [www.bates.edu/fsallocation](http://www.bates.edu/fsallocation) direct link for the FSA program.

Recruitment activities include information posters announcing and email messages sent via *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, regular in-person counseling services, and always predictable schedules. Let the students know that you will count on them to be active contributors to the program.

Make sure students are aware of any planned excursions that may include hiking, biking, long walks, or strenuous activities. Often, these should be avoided to allow for participation of all students. These can be option activities that students can pursue on their own.

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 leaders. 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 Gallant on these applications. The faculty serve as the first-year advisor for these students.

### Applications and Acceptance Forms

FSA program applications for students are on-line and managed by the Center for Global Education based on past applications and suggestions of the faculty. Customization of this application is possible and interviews of all students who have applied to the FSA should be conducted to ensure not only fit but understanding of the program. Completed applications will be shared with the faculty leaders electronically.

After acceptance, students confirm their intent to enroll by returning two forms to the Center for Global Education. 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. With Dean Gallant's assistance, 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 February 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](http://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 May 1. The Center for Global Education will collect these and other documents from students, review them, make copies, and distribute them to faculty. The faculty should take all of these documents on the program for possible future reference. Once the program is complete, the faculty should return these to the Center for Global Education to be destroyed. A complete set of the documents is left with the Center for Global Education.

### 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 online at <http://www.embassy.org/embassies/>. It is helpful to work with a specific individual in the visa office at the consulate. The Center for Global Education 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. Using other travel agencies is also an option. 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. Budget Planning, Reporting, and Management**

Budgeting and record keeping are 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 20-25 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 Stephanie Walsh in the Accounting Office as you develop your budget and for advice on accounting procedures. The Accounting 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 Accounting Offices. Proper record keeping and receipt verification will clear the advance from your vendor record file in the Accounting 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. In order to free up administrative burdens, we recommend one of two ways for disbursing this stipend: conducted by on-site partner or deposits to students' checking accounts. The first option depends on a reliable partner organization and a contract outlining this process. The second has been challenging but gives Bates more control over the disbursement of funds.

Usually these funds are distributed at two week intervals with the students signing to confirm receipt of each distribution. 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 Gallant 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 Accounting 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 Stephanie Walsh in the Accounting Office in January after the conclusion of the program. (Use of the categories below works well for the Accounting 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 Accounting 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](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, Stephanie Walsh 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 Gallant or Stephanie Walsh 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, 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 / housing
- Reception/gifts for host families
- Food and housing during non-host family time
- Commuting expenses for students, if any
- Hotel / apartment costs

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)
- Study Abroad Provider Contract Fees

Field trip and cultural outings expenditures:

- Transportation
- Lodging
- Food
- Entry fees / tour guides

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

Staff:

- Housing for faculty members and family, if any.
- Food and related living expenses for faculty members and family, if any.
- Mailing materials abroad (Sometimes students carry program materials to reduce the cost.)
- Language faculty salary and taxes
- Visiting lecture honoraria

Other:

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

## **9. 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.

Similar to U.S.A colleges and universities, the first few weeks of the program are statistically the most dangerous for a student studying abroad. There is also evidence that sexual harassment and assault occur at higher rates abroad. There are many opportunities for behavior that students may not have experienced before and students may not have figured out the safety and cultural norms

they need to remain safe. Bates and the faculty leaders of the program have a special relationship with students, according to courts, and safety is key to providing quality experience for all.

## **Health and Safety Advice and Protocols in a Timeline Format**

### Program Development Phase

Consider health and safety issues when you select your host location. 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' housing? Are there crime issues in the neighborhood? Would the organization 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/>

Bates faculty, students, and staff are covered by the CHUBB Travel Assistance program when traveling on Bates business.

- The CHUBB emergency center is open 24/7. If calling from the United States, the number is: 1-800-243-6124. If abroad, the number is: +1-202-659-7803 (call collect). The Bates plan number is: 01-SP-585. Please note that this emergency medical assistance does not eliminate the need for regular health insurance. Download the Information Card

You should enter the appropriate telephone number into your cell phone so it will be available if needed.

Review information regarding the program's location on CHUBB's webpages. CHUBB 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.

### **When to Contact CHUBB Travel Assistance**

- You need medical advice on the country where you will be studying.
- You need help finding a doctor, dentist, hospital, attorney, interpreter, a US embassy or consulate.
- You need help obtaining prescription medications, including eye care.
- You need help replacing essential travel documents, including tickets and passport.
- You need an emergency cash advance, up to \$1,000 USD.
- You need money to pay a doctor or hospital. (This is a temporary loan.)
- You need an emergency medical consultation and/or medical monitoring of your condition and medical treatment.
- You need to determine whether you need a more specialized hospital for treatment. CHUBB Assistance will dispatch a physician or specialist at its expense to evaluate your situation and determine whether an evacuation is needed.
- You need a medical evacuation to a more specialized hospital. If CHUBB Assistance agrees, it will dispatch a physician or specialist to accompany you, arrange travel to the nearest suitable facility, and pay for these services.

- You need to return home for medical care on an emergency basis. If CHUBB Assistance agrees, it will arrange your travel with medical supervision, if necessary, at its expense.
- If you are hospitalized for more than seven days and you want a family member to visit. CHUBB Assistance will arrange and pay for the transportation costs of this individual.
- CHUBB Assistance will arrange and pay for the return of your remains if you die while abroad.
- In case of a political or natural disaster, CHUBB Assistance will arrange your evacuation to the nearest place of safety.

Review the program, health and CDC immunization recommendations with Dean Gallant.

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

- Selection of taxi and bus companies
- Selection of home stay families/housing, 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 mental health 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

Do not overpromise access to medical care, especially counseling services. Alert students to any rigorous physical activities, such as: hiking, biking, or similar. There should not be any swimming included in the program. 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 Dean Gallant 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 needed.

### 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 physical or academic accommodations,

those taking prescription medications, and/or those managing mental health concerns 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 Dean Gallant. Alternatively, you can tell the student that you are going to ask Dean Gallant 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.

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 – you and the host institution's contact information, departure and return flight information, and other information of interest.

### Arrival Phase

Conduct Orientation; topics to include:

- 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.

- Depending on the location, it may be necessary to warn women of more frequent “sexual hazing” or “cat calling” 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

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, Bates Security, 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 deadliest. 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 – may be covered by host organization

- 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 Center for Global Education 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 Center for Global Education.
- 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.” If the on-site organization has a process for this, make sure the faculty leaders and the Center for Global Education also receive a copy.

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.***

### **10. 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, and 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 Doug Morency (dmorency@bates.edu), the head of Security at Bates. (Please copy Dean Gallant.) 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 Gallant of the incident.

For a confidential event, it is important to seek professional help, on-site or back at Bates, for the student and not try to manage the situation on your own. 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.

Darren Gallant, [dgallant@bates.edu](mailto:dgallant@bates.edu), +207-786-6223 wk; cell provided directly

David Das, [ddas@bates.edu](mailto:ddas@bates.edu), 207-786-6223 wk

Gwen Lexow, [glexow@bates.edu](mailto:glexow@bates.edu), 207-786-6445. [www.bates.edu/sexual-respect](http://www.bates.edu/sexual-respect)

Doug Morency, Director, Bates Security: [domorency@bates.edu](mailto:domorency@bates.edu), 207-786-6254

Paul Menice, Clery Act contact, Bates Security, [pmenice@bates.edu](mailto:pmenice@bates.edu)

Joshua McIntosh, Dean of Students, [jmcintosh@bates.edu](mailto:jmcintosh@bates.edu), 207-786-6219

## **11. 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/>

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 from vetted companies, 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 CHUBB Travel Assistance when on Bates sponsored program abroad. This service is provided by ACE Insurance. CHUBB 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 CHUBB before incurring a cost or service that it will pay for, such as a medical evacuation.

The CHUBB emergency center is open 24/7. If calling from the United States, the number is: 1-800-243-6124. If abroad, the number is: +1-202-659-7803 (call collect). The Bates plan number is: 01-SP-585. Please note that this emergency medical assistance does not eliminate the need for regular health insurance. [Download the Information Card](#)

## **12. 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.

## **13. Fall Semester Abroad Program Planning Timeline**

Several years in advance of anticipated program.

- Consult with Dean Gallant, 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 AAC.
- 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 organization to discuss language faculty, support and services they can provide. (Program budget pays for this.)
- Construct an initial budget, consulting with Stephanie Walsh in the Accounting 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).
- 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. The Center for Global Education will assist.

#### September

- Attend Study Abroad Fair sponsored by Center for Global Education. Ask students who participated on past FSA programs to join you.

#### October

- 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 Center for Global Education of time and location so it can distribute brochures to first-years and sophomores. A few days prior to session – send email message 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.

#### December

- Early application deadline.

#### January

- Review early applications and provide response to students.
- 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 Gallant with “Agreement Governing Participation” and “Understanding the Risks” forms. These forms are returned to the Center for Global Education by late February.
- Receive final approval to conduct program if 20 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

- 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 Gallant 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 Center for Global Education.
- Work with Stephanie Walsh 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 Gallant).

## August

- Departure. Refer to orientation content and schedule in the Safety and Risk Management section.

## Sept/Dec.

- Weekly status reports to Dean Gallant. One or two sentences are adequate if the program is going smoothly.

## January

- Program evaluation by Center for Global Education, financial accounting, program report by faculty.

## **14. Bates Contact Information**

- Web Page: [www.bates.edu/offcampus/faculty](http://www.bates.edu/offcampus/faculty)
- Bates Security: +207-786-6254 (staffed 24/7)
- Bates Center for Global Education: +207-786-6223, Fax +207-786-8331
- Darren Gallant; [dgallant@bates.edu](mailto:dgallant@bates.edu) , +207-786-6223 wk, cell provided directly
- David Das: [ddas@bates.edu](mailto:ddas@bates.edu), +207-782-3101 home
- Stephanie Walsh: [hward@bates.edu](mailto:hward@bates.edu), 207-786-6444
- Doug Morency, Director of Bates Security: [dmorency@bates.edu](mailto:dmorency@bates.edu) +207-786-6254
- Bates Security: +207-786-6254 (open all the time)
- Dean of Students Office: +207-786-6219; [jmcintosh@bates.edu](mailto:jmcintosh@bates.edu)
- Bates Health Center: +207-786-6199, Kate Staley home +207-933-2925
- Gwen Lexow: [glexow@bates.edu](mailto:glexow@bates.edu), +207-786-6445 [www.bates.edu/sexual-respect](http://www.bates.edu/sexual-respect)
- Human Resources Office: +207-786-6140
- Registrar's Office: +207-786-6097, Fax +207-786-8350, [registrar@bates.edu](mailto: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>
- The CHUBB emergency center is open 24/7. If calling from the United States, the number is: 1-800-243-6124. If abroad, the number is: +1-202-659-7803 (call collect). The Bates plan number is: 01-SP-585.