**PROGRAM DIRECTOR HANDBOOK ON SHORT-TERM STUDY ABROAD**

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**I. INTRODUCTION**

**Importance of Study Abroad**

Edgewood College and the Center for Global Education are committed to giving its students a global perspective. Immersion through study abroad provides a unique opportunity for students to gain the first-hand knowledge and cross-cultural skills needed to be effective global citizens. A study abroad program led by Edgewood faculty and/or staff allows students to explore course-related topics in a real-world setting while giving them the security of traveling with an instructor they know and respect. It also allows faculty/staff to share their international expertise with students.

**Purpose of the Handbook**

The Center for Global Education (CGE) is providing this handbook to assist faculty/staff Program Directors (PD’s) in designing and implementing short-term study abroad programs. The CGE defines short-term as a program that includes a travel component ranging from one to four weeks in length. This handbook is intended to serve as a guide for new PD’s, as well as a refresher for seasoned Directors. We hope it will answer PD’s most frequently asked questions and outline policies associated with program development. The design and implementation of effective education abroad programs requires significant preparation. PD’s will need to work closely with the Center for Global Education and other units in the campus community. Following the procedures outlined in the handbook will optimize the possibility for a successful program.

If there are questions unanswered by this handbook, please contact the Faculty Co-Director in the Center for Global Education. Our staff is available to answer questions, provide suggestions and resources, and facilitate PDs’ planning, development, and implementation of a study abroad program. Also, please be aware that amendments may be made to this handbook. The most up-to-date version will be available online at the Center’s website <http://globaleducation.edgewood.edu>. Lastly, we thank you for creating these opportunities for Edgewood students. Your work and dedication are greatly appreciated.

Center for Global Education Contacts:

Andrea Byrum, Faculty Co-Director Sara Friar, Staff Co-Director Nicole Miller, Study Abroad Advisor/Program Assistant

[byrum@edgewood.edu](mailto:byrum@edgewood.edu) 663-2261 [sfriar@edgewood.edu](mailto:sfriar@edgewood.edu) 663-2277 [nmmiller@edgewood.edu](mailto:nmmiller@edgewood.edu) 663-2285

**II. ROLES AND RESPONSIBILITIES**

Many people are involved in the successful operation of short-term programs. Below are the key responsibilities of the Program Director, the Center for Global Education, Chairs/Deans/Supervisors, and student participants.

**Program Director**

An effective Program Director (PD) requires a variety of talents and skills necessary to cope with the diverse responsibilities a study abroad program demands. You will have different duties as you plan, run, and then return from your program. Preparation will focus on your development of a program proposal and then working with various units to implement the program. While abroad, you may be an instructor, but you will also serve as an administrator and counselor (academic and personal). On return, you will justify the budget and submit a program evaluation.

The PD’s responsibilities last throughout the process, often a 9 to 10-month period. The PD supervises the program under guidelines in this handbook. PDs are expected to set a good example for participants and are required to follow the policies and codes of conduct of Edgewood College, as well as U.S. law and the host country’s law.

In general, the person proposing and leading the program will be a full-time faculty member teaching in her/his recognized field of expertise. Staff and part-time faculty may lead programs abroad provided they have obtained the support of their respective supervisor or department chair/ dean prior to proposing a program.

The Program Director’s first step should be to read the information in this handbook, and then make an appointment with the appropriate department chair, school dean, and the Center for Global Education to discuss the proposed program. The PD can decide whether these are individual or joint meetings.

***Qualities of an Effective Program Director***

* Knowledge of and experience in the country/ies involved OR a plan to work with a program provider who has the appropriate knowledge to achieve the program’s goals and ensure the safety of participants
* Academic expertise in the content areas covered in the course/s associated with the study abroad program
* Good organizational and planning skills, to deal with the steps and issues involved in all phases of a short-term study abroad program from planning to final evaluation: academic, financial, and personnel issues, etc.

***Program Director Key Responsibilities***

Program Development:

* Consult with the appropriate Department Chair and School Dean or Supervisor about the Program Proposal (see section 3—Program Development), in particular the academic components and workload/salary issues.
* Consult with the Center for Global Education about the program proposal, in particular best practices, itinerary and logistics, and health and safety issues
* Develop a program proposal, including academics and logistics.
* Present the proposal roughly 5-7 months in advance of the course start date to CGE for discussion and endorsement and to her/his department and school dean/supervisor for discussion and approval.
* Serve as the primary contact between Edgewood and any vendors (hotels, abroad program guide operators, academic institutions, etc.) whose services will be used for the program.
* Work collaboratively with the CGE, other EC offices, and vendors to develop a fiscally responsible program budget.

Academics:

* Create academic content for the program consistent with the standards for courses at EC.
* Develop syllabi or outlines for program courses.
* When appropriate, choose textbooks and resource material for the courses.
* Select qualified instructor/s for the course/s (if hiring instructors in the host country).

Recruitment and Application Process:

* Upon approval, make application forms available and actively promote the program and recruit students by holding information sessions and following up on student inquiries (see Appendix F for the Study Abroad Application Template).
* Share information with other faculty and staff who may assist in recruitment.
* Provide CGE with any recruitment materials for further distribution.
* Review students’ applications and make selection.

Pre-departure preparation:

* Work closely with the Business Office to set up an account and monitor the income and expenses associated with the program.
* Provide CGE with the Program Participant Roster (see Appendix H).
* Work with CGE on pre-departure orientation sessions and collection of forms.
* Provide CGE and participants with a detailed itinerary (See section III--Program Development).
* Advise CGE and participants of any changes in previously agreed upon travel, accommodations or other course-related arrangements.
* Comply with all Edgewood and government regulations regarding travel, study, and research in the host country.

On-site:

* Teaching and facilitating discussions and activities to promote cultural immersion.
* Be available to students on a regular and emergency basis for consultation on individual and group problems, including those that are non-academic in nature.
* Ensuring appropriate student conduct and, if necessary, enforcing the disciplinary procedures as outlined in the Study Abroad Student Code of Conduct & Responsibilities and Waiver & Release Agreement (Appendix J).
* Advise CGE immediately of any emergency related to, or injury of, a course participant or a third party. For liability reasons, the PD must complete an Incident Report Form (see Appendix I).
* It is recommended that at least one faculty member (or staff member) escort the students to and from the overseas destination if the airfare is included in the program fee.
* If there is only one Program Director, that person must designate a program assistant or on-site staff member to provide back-up assistance in the event of an emergency.

Post-program:

* Facilitate reflection and processing with participants.
* Submit final grades to the Registrar’s Office using grading practices that conform to EC policies.
* Within one month of the program’s completion, have students complete a Participant Program Evaluation (see Appendix M for template) and submit results to CGE and the appropriate Chair/Director/Dean/Supervisor.
* Organize a post-program meeting with CGE and the appropriate Chair/Director/Dean/Supervisor to evaluate program strengths and potential areas for improvement.

**The Center for Global Education**

The role of the Center for Global Education is that of a collaborator, supporting the PD in every phase of program development and implementation. If you are considering leading a study abroad program, you are encouraged to contact the Faculty Co-Director early on to explore what services are available to you.

Below are specific responsibilities of the CGE in relation to short-term programs.

Program Development:

* Provide general support in the development, implementation, and administration of short-term programs.
* Assist the PD in developing a well-prepared Program Proposal for review by the appropriate bodies (e.g.: CGE can recommend travel agents, study abroad providers, and overseas institutions or contacts in certain countries; and CGE can provide best practices, especially related to budget, itinerary and logistics, and health and safety issues.)
* Provide guidance on developing a budget that is fiscally responsible and in compliance with Edgewood policies.

Program Promotion:

* Assist the PD in developing marketing materials.
* Help promote information sessions conducted by the PD.
* Promote the program to eligible students who seek general study abroad information from CGE.

Program Implementation & Administration:

* Provide a sample student application, which the PD can adapt (see Appendix F).
* Give advice on best practices for the application and selection of student participants.
* Work with the PD on a pre-departure orientation for all program participants.
* Provide the PD with a Health and Emergency Information Packet (see Health and Safety in section IV).
* Register the participants with the U.S. Department of State.
* Give recommendations as to whether the study abroad program should go forward in the case of a serious situation.
* Provide support in case of an emergency abroad.
* Maintain copies of group records for crisis management.

Post-Program:

* Provide a template for the Participant Program Evaluation (see Appendix M).
* Make observations and recommendations after receiving the Participant Program Evaluation results from the PD.

**Department Chairs/ School Deans/Staff Supervisors**

Academic programs and schools are responsible for review of the program and course subject matter and the instructional delivery methods. The Center for Global Education can offer expert counsel to Chairs, Deans, COR Director, faculty, and staff about general issues like program development or specific issues like itinerary, logistics, budget, and health and safety. For a successful program, there should be ongoing consultation and coordination amongst the Chairs/Deans/COR Director/Supervisors, the PD, and the CGE staff.

The PD should work with and get approval from the School Dean or Supervisor in the unit where she/he holds an appointment. In addition, if the proposed study abroad course and/or program involve a unit other than the one where she/he has an appointment, then the Director/Dean of the other unit also needs to be consulted and give approval (ex. COR II courses).

* Early on, discuss with the PD her/his program concept to determine feasibility and desirability. Considerations: goals and academic merit, contribution to department/school goals, expertise and experience of the PD, academic components. Give/not give initial approval.
* Once initial approval is given: continue to consult with the PD while she/he develops a full Program Proposal (see section III --Program Development). Especially important is the Chair’s/Dean’s input on academic components: what course is associated with the travel component of the study abroad program, what are the learning objectives, what students to target, what requirements would be fulfilled, what timing is best for the faculty/unit?
* Once the full Program Proposal is submitted: serve on an ad hoc committee with the CGE Co-Directors to discuss and approve/not approve the proposal. Sign the Program Proposal Form (see Appendix B).
* Once the program is approved: along with CGE, monitor program implementation, assist PD as needed, and receive progress reports from PD.
* During and after the study abroad program: be involved and/or consulted in case of any emergency or problems during the travel component.
* Attend a post-program meeting with CGE and PD to evaluate the study abroad program and make recommendations.

**Students**

The PDs need to ensure that students know and understand their rights and responsibilities. These are explained in the Study Abroad Student Code of Conduct & Responsibilities and Waiver & Release Agreement that students will sign (see Appendix J)**.**

**III. PROGRAM DEVELOPMENT**

**Development Timeline**

The typical timeline for developing and implementing a short-term study abroad program is as follows: for a spring semester program, 5 months from the time the Program Proposal is submitted for approval until the beginning of the course; for a fall semester program, 7 months from the time the proposal is submitted until the beginning of the course. This provides the necessary time to get approval, work on logistics and academic components, recruit students, and prepare the group for departure.

The timeline below is meant as a guide for PDs; actual times may vary based on specific program needs and travel dates.

|  |  |  |
| --- | --- | --- |
| *Months prior to course start date* | | *Tasks* |
| Fall Semester Program | Spring Semester Program |  |
| 10 months | 9 months | * Get Chair’s/Dean’s support for program concept * Consult with CGE on how to develop a program proposal |
| 7 months | 5 months | * Submit Program Proposal Form (see Appendix B) * Proposal reviewed and approved (to meet Timetable deadlines) * Work on logistics, itinerary, and budget; consult with CGE as necessary (See Appendices C-E). * Attend Program Director Workshop sponsored by CGE |
| 6 months | 4 months | * Confirm on-site contacts/ agency affiliations * Establish application procedures and deadlines (see Appendices F & G). * Develop marketing materials (see Appendix I) * Begin to promote program and recruit students |
| 5 months | 2 months | * Accept applications from students until established deadline; make final selections * Send acceptance materials (i.e. acceptance letter, payment schedule and withdrawal policy (see Appendix G), travel arrangements, visa info, etc.) |
| *Months prior to departure date* | | *Task* |
| 3 months | 3 months | * Collect program fees from students according to payment deadlines (see Appendix G) * Working with CGE, direct students to complete required study abroad forms * Submit Program Participant Roster to CGE (see Appendix H) * Plan pre-departure orientation session(s) * Continue to collect fees according to payment deadlines |
| 2 months | 2 months | * Submit to CGE: Final itinerary (see Itinerary and Logistics section- page 10) * Make final preparations and confirm program logistics * Check that all students have paid in full |
| 0 months | 0 months | * Departure: Use Expense Log within Budget Worksheet (see Appendix C), keep all receipts, keep CGE informed of changes to itinerary and any emergencies |
| Within 1 month after return | Within 1 month after return | * Turn in Expense Log and final accounting to Renee Pittz in the Business Office * Turn in results from Participant Program Evaluations (see template in Appendix M) to CGE * Schedule a post-program meeting with CGE and appropriate Chair/Dean to evaluate program |

**Program Proposal and Approval**

The Center for Global Education, in partnership with academic departments and schools, facilitates and develops study abroad programs for Edgewood students. Study abroad program proposals should originate with faculty and should carry the endorsement of appropriate departmental and college administrators. CGE welcomes early, informal consultation by faculty and staff for program planning and encourages coordinated programming among departments and schools.

Academic programs and schools are responsible for review of program and course subject matter and instructional delivery methods. Once you have your idea for directing a short-term program, you should first meet with your academic unit to discuss the course concept and timing and get initial approval. Once this initial approval is obtained, you will work on and submit a full Program Proposal for approval to the appropriate departmental and school administrators, as well as to the Co-Directors of the Center for Global Education for their endorsement (see *Procedures for Review of Program Proposals Section* below.)

Be sure to allow adequate time for the necessary planning, with submission of the full Program Proposal at least 5-7 months before the course start date. (See Appendix B for the Program Proposal Form)

***Procedure for Review of Program Proposals***

As the number of short-term study abroad programs increases, increased coordination and communication throughout the college will ensure successful programs in terms of enrollment and variety. The review and approval process facilitates the coordination of the growing number of study abroad programs at the College and ensures the health and safety of our students. Please review the list of all Edgewood College faculty/staff-led international programs on the CGE website.  
  
The PD submits a Program Proposal, which is reviewed by an ad hoc committee consisting of the appropriate Department Chair(s), School Dean(s), COR Director, Staff Supervisor, and the Co-Directors of the Center for Global Education. The Co-Directors will endorse or not endorse the proposal; the Supervisor, Chair and/or Dean will approve or not approve the proposal.

The following are factors for consideration in approving new study abroad programs:

* Academic merit
* Department/School/Staff Unit support
* Significant level of cultural immersion and use of local resources
* Anticipated cost of the program and minimum/maximum enrollment (See Budgeting section—page 12)
* Safety of the program destination; provisions for student health and safety\*
* Academic focus and destination “fit”
* Program Director’s/Directors’ expertise/experience and program subject matter “fit”

If the program is not initially approved, feedback will be provided with an opportunity for revision and resubmission.

\*Edgewood does not usually approve study abroad programs when a U.S. State Department Travel Warning is in effect for the program destination. For further details, see the document “Guidelines for Edgewood-Sponsored Programs Abroad: Safety and Travel.”

**Academic Components**

In designing the curriculum, Program Directors must work closely with their academic unit(s), since academic programs, departments, and schools are responsible for review of program and course subject matter and instructional methodology.

The following are guidelines that will help in curricular design:

* Short-term study abroad integrates traditional classroom education with experiential learning and site visits. PD’s should articulate the relation between the course content and the course location. They should also think carefully how to integrate readings, lectures, site visits, and field work in the special environment of a program abroad.
* How will the program take advantage of the international setting?

How will the program design insure significant contact with the host culture/language?

(e.g., through a local university, guest lecturers, internship or servicer placement, access to local organizations, living with a host family)

* What is the educational outcome you seek? What are the academic, cultural, and personal objectives for students?
* Structure: is the international travel tied to a semester-length course, or is it a “stand alone course”?
* What topics will be taught at Edgewood versus the host country?
* Consider the course number and the number of credits. How many of the contact hours will be done in a classroom and how many in experiential learning?
* Will the course and/or study abroad program offered apply to majors, minors, general education requirements, and/or electives?
* Consider teaching techniques during the study abroad program: there could be fewer lectures and long readings; use techniques integrating cross-cultural elements, e.g., interviews, journals, photos, presentations, cultural artifacts. Balance experiences with time to process/reflect on experiences.
* Good methods for using resources abroad: universities, government agencies, NGO’s, museums, media, people.

**Itinerary & Logistics Planning**

*Itinerary:*

The planning of the itinerary will start with the desired duration of the study abroad program and the desired dates of departure and return.

Here are some key questions the PD should answer:

* Duration: How long do you want the international travel portion of the program to last? What are optimal dates of departure & return?

(Keep in mind students’ availability and the schedule of Edgewood classes and holidays.)

* Location: Do you want only one location or several? (Keep in mind the need to move around, for the latter.) What transportation will you use between the various sites? Are there any U.S. Department of State travel advisories or warnings for the area?
* Activities: What kinds of activities do you want? Options: in-country orientation, classes, lectures, excursions, community-engaged and/or service learning. Minimize high-risk activities.

PDs are required to give to the Center for Global Education a detailed, written itinerary that includes: dates of travel, flight information (airports, airlines, flight numbers, and times), daily schedule of activities and names, addresses and phone numbers of accommodations in each location. They must also inform CGE of any changes made to this itinerary either before or during the abroad program.

*Logistics:*

To plan the logistical components of a short-term study abroad program, the following questions must be answered. (These answers will also help in calculating the budget.) A foremost consideration in all logistical planning is the safety and security of the students.

* How is the group traveling from the point of departure to the destination, and within a country? Which transportation components are included in the program fee?

(For ground transportation, consider cost, safety, and reliability of the provider; also consider the maximum number of passengers that can fit in a van or bus.)

* Where does the program originate? (e.g., from Madison, Chicago or Milwaukee airport?)
* Where will the group stay? (e.g., hotel, hostel, host families, university dorms, etc.)
* What meals are included in the program fee? Where will the group eat, in the various locations?
* Is classroom space required? What is the cost?
* Do you need any special arrangements to secure local faculty or experts? Are students enrolling in local institutions?
* Does the country you are visiting require a visa? Do students have passports with sufficient validity beyond the dates of the program?
* Do you require an interpreter and/or a guide?
* Is there accessibility for students with special needs?
* What is the maximum and minimum number of participants you want?

Related to these issues is a major decision the PD must make: who will plan the logistics? There are three possibilities; the PD can choose one or a combination of them:

* The PD herself or himself
* A partner institution abroad, e.g., a university
* A service provider

Making arrangements for lodging, transportation, excursions, etc., can take a lot of the PD’s time. The approach a leader chooses depends on the number of in-country contacts he/she may have, the time he/she can commit to researching logistics, and the level of in-country support he/she requires once abroad.

For those with few in-country contacts and less experience with the area and/or the language, having the assistance of an organization specializing in international educational programs can be an asset. There usually are additional costs associated with a service provider, but it could be worth it. To find out reliable service providers, ask colleagues and/or the Center for Global Education for advice and recommendations.

Tips on logistics:

* Have a written agreement with any company you are dealing with, specifying the types and costs of services to be provided.
* Plan carefully how and when you will pay for the various components of your abroad program. Check with providers (hotels, abroad program operators, ground transport, etc.) as to acceptable forms of payment.
* For air reservations: if you are making the booking or using a travel agency, consider how you will pay for the group’s tickets. If using an Edgewood credit card, make sure you are not exceeding your spending limit, or ask the Business Office for a temporary increase in your limit.
* Always ask if there is a special group rate, for instance, for air or lodging.
* Note these specific Edgewood policies related to ground transportation:

Use only registered taxis and know how to recognize them. Where safe and possible, use public transportation. If hiring a bus or van, request a certificate of insurance; at a minimum, get a copy of a driver’s driver license and check his driving record, and get a copy of the insurance on the vehicle.

**Budgeting**

The CGE has provided a Budget Checklist along with an interactive Budget Worksheet created in Microsoft Excel for the PD’s use in all stages of planning and implementing a short-term program (see Appendix C-D). The Budget Worksheet is set up with three tabs: Cover Sheet, Budget, and Expense Log. The Budget tab contains a breakout of costs for both the individual students, as well as a section for shared administrative costs. Utilizing this section during the planning stages helps the PD consider the potential expenses involved in the study abroad program and informs the final program fee. The Expense Log tab is designed to be filled in while the PD is incurring expenses in-country, so that tracking can be done easily in the local currency.  
  
The PD is encouraged to utilize the Budget Worksheet in any way she/he would like; however, it is important to note that the Worksheet is designed to auto fill from tab to tab and does much of the work for the PD if filled in electronically (e.g. currency conversions). To make the most of the worksheet’s design, the PD is encouraged to follow the instructions found in the red-tagged cells starting on the Cover Sheet; fill in only the gray-shaded areas of the worksheet, and fill in the three tab pages in order. If you have questions on the Budget Worksheet, please contact the CGE staff.

One major consideration in establishing a program budget is determining how the PD’s expenses will be covered. The most common method is that the PDs expenses are covered by the students’ program fee (the total PD expenses should be divided by the number of student participants). This is the method used in the Budget Worksheet (See Appendix C). The only other options to cover PD expenses are to apply for a faculty mini grant and/or request department/school funding.

Please be aware that there is very limited funding for PD travel to the host country for exploratory site visits.

**Program Director Financial Transactions**

Once the program is approved, the Program Director (PD) should contact the Accounts Payable Associate in the Business Office (x2229) to set up an account number specifically for your study abroad program. You can deposit and withdraw money from this account as needed to pay for travel and other program expenses. Student payments will also be deposited directly into the program account and the PD will be able to track payments and all transactions online on Edgewood Express. **All standard Business Office policies apply. Refer to the Business Office’s my.edgewood.edu site for forms, policies, and processing timelines.**

***Account Set-up***The PD will typically set up an account during the semester prior to the dates of travel. The PD needs to provide the Business Office with the following information:

* Dates of Travel
* Names of all PDs and assistants
* Roster of students
* Payment schedule for students (dates and amounts)

Deposits into the account can be made at any time and should be accompanied by the appropriate GL account number.

***Withdrawals and Payment for Services***   
There are multiple ways to withdraw money from your account and make payments for the services/products needed for your program. Check with your service providers and contacts regarding the form(s) of payment they will accept.

* Credit Cards
  + Use of a credit card will likely be one of the most convenient methods of payment both in the U.S. and abroad. We recommend that at least one Edgewood faculty or staff member for each program has a credit card issued by the College. If you do not already have an Edgewood credit card, you can request one in the Business Office at least one month before anticipated use. The standard credit limit is $2,000 per month. If you need a higher limit due to group airfare purchases or other expenses, call the Business Office (x2229). A member of the Business Office will route your request to the Controller for approval. Once your request is approved, it will be faxed to the provider of our commercial credit card, M&I Bank. Typically this process takes 3-4 days.
* Cash Advance
  + Some vendors or restaurants abroad may not accept credit cards or checks from the U.S., so the Center for Global Education recommends taking a limited amount of cash. Some situations in which you might need cash are ground transportation, tips, restaurants, and emergencies. To request a cash advance submit a check request with the PD’s name in the “Payable to” line. Check with the Business Office for current processing times. It is recommended to submit your check request at least 1 week in advance of the date on which you need the cash.
  + Some PDs may feel more comfortable ordering some local currency. The PD would contact her/his bank of choice to order the amount of local currency they desire. It is recommended to place the order at least one week in advance. Be sure to ask about applicable shipping costs, transaction fee, and exchange rate. Historically, requesting currency from a local bank will not be the best option if you are looking for the best exchange rate.
* Invoices
  + Sign and write the appropriate GL account number on the original invoice and submit it to the Business Office within one week of receipt.
* Wiring Money - Contact Jane Wilhelm in the Business Office for details on wiring money.
* Check request (Use for payment when no invoice is available)
  + Check request forms can be found on <http://my.edgewood.edu>.
  + Documentation should be stapled to the check request form
  + Payment to individuals must have person’s address, social security number, and a W-9; if the individual is not from the U.S. provide the person’s complete address, phone number, and employer.
  + If you are working with an organization or company, request an invoice to submit to the Business Office.

***Expense Logs and Receipts***

Whenever possible, it is important to retain a receipt of all financial transactions. To aid the PD in tracking expenses, the Expense Log tab of the Budget Worksheet (see Appendix C) is provided as a tool. This interactive spreadsheet allows the PD to enter the expense in local currency and will automatically convert the amount into US dollars based on the inputted exchange rate.

**Student Payments and Withdrawal Policy**

It is important for the PD to develop a payment and withdrawal policy. PDs can expect a few students to sign up for a study abroad program and later decide that it is not possible for them to participate. Students need to know early on the financial ramifications associated with their withdrawal from a program so that they can make appropriate decisions.   
  
The PD can work with the CGE and the Business Office to ensure an appropriate payment and withdrawal policy is set up. In addition to the non-refundable deposit, this policy should outline the financial penalties if participants withdraw at various points along the timeline, including after the program has started, and involuntary withdrawals. For a sample of how to communicate the payment schedule and withdrawal policy see Appendix G.   
  
It is important to collect a non-refundable deposit from students to act as a deterrent to casual enrollment and cancellation and to use to purchase airfare. The PD should decide the amount of the non-refundable deposit and if it should be paid with the application or upon acceptance. Assuming the non-refundable deposit will be used to purchase airfare, $500 to $1500 is typical. All deposits and fees must be payable to Edgewood College, not to the Program Director. The program’s course number should be written on the check. It is recommended that students submit the payment of their deposits directly to the Business Office. Once students have paid the non-refundable deposit, subsequent billing and payment of fees is made through the Business Office.

The PD should establish a schedule that includes specific payment amounts and due dates. Usually students should pay a third or fourth of the total program fee on each due date. A minimum covering the cost of airfare must be deposited in a student’s account before airline tickets can be purchased. In establishing the timeline of payments, the PD should keep in mind the dates by which airfare and other expenses (hotel deposits and other costs that require prepayment) must be paid.  
  
The PD should routinely check with the Business Office that the proper installment payments are being made by students and especially at the end that all students have paid in full. The PD can track all payments and transactions on Edgewood Express.   
 **Financial Aid**Students should visit Edgewood Central to discuss their individual situations regarding financial aid. The Center for Global Education does not currently have study abroad scholarships available for short-term programs.

**Insurance Requirements**

A student in Rome is hit by a scooter and ends up in the hospital. A student in Chile gets a cold that turns into pneumonia and he ends up spending two nights in the hospital. A coup d’état in Thailand happens a week before the scheduled departure date. An earthquake strikes 30 miles from a study abroad site. All of the aforementioned situations have happed to Edgewood study abroad students and the list could go on and on. Proper health and travel insurance coverage for students and PDs can make emergency situations much less stressful and easier to manage.

Travel insurance and health insurance is not necessarily the same thing. Although every policy is different, *travel* insurance generally includes coverage for trip cancellation and interruption, lost or damaged baggage, emergency medical expense and transportation (varying levels), and other travel assistance services. On the other hand, study abroad *health* insurance generally includes more comprehensive coverage for medical emergencies, medical evacuation and repatriation, doctor visits for non-emergency illnesses or injuries, and some prescription drugs.

***Health Insurance***   
Best practice in the field of study abroad states that all students and PDs should have health insurance coverage in all countries that will be visited during a study abroad program. While many (not all) of our students have health insurance coverage in the U.S., it would be very time consuming for PDs to ensure that each student’s insurance coverage extends outside the U.S. Even if a student’s policy extends beyond the borders of the U.S., domestic policies typically do not include coverage for emergency medical evacuation and repatriation of remains. **To protect our students and PDs, Edgewood College requires that all students, faculty, staff and assistants participating in an Edgewood sponsored short-term program enroll in the WAICU Study Abroad Health Insurance Policy.** This policy does *not* include *travel insurance* (e.g. baggage delay, trip cancellation coverage, etc.)—See Travel Insurance section below.  For complete details on the WAICU Study Abroad Health Insurance Policy, please visit the Center for Global Education study abroad webpage for the current policy brochure.

The insurance premium is billed on a rolling monthly basis and the cost of the insurance should be calculated into the overall program fee. As of fall 2011, the monthly rate for students was $35 and the monthly rate for faculty, staff and assistants was $40. All participants need to complete the Health Insurance Enrollment Form (see Appendix K) and submit it to CGE. CGE will enroll participants in the plan for the coverage period indicated on the enrollment form. The cost of insurance will be billed directly to the program’s account in the Business Office.

***Travel Insurance***  
The PD should decide whether to require travel insurance or not. If it is required, it should be included in the program fee. If it is not required, each participant can purchase travel insurance on their own. CGE recommends the *Savvy Traveler* policy through Travel Guard ([www.travelguard.com](http://www.travelguard.com)), which is a leading provider in the travel insurance industry. You can purchase this policy from most travel agencies, so feel free to inquire about the Savvy Traveler policy at whichever agency you choose to utilize for your group travel flights. PDs can also call Travel Guard’s customer service line: (800) 826-4919 for more information. Please note that the *Savvy Traveler* policy is the minimum coverage that we recommend; you may purchase a more comprehensive policy if you choose.

IMPORTANT: If you are planning to purchase travel insurance largely for the *Trip Cancellation* benefit, we advise you to read the small print carefully before purchasing a plan. There are often a lot of exclusions and limitations, and we have yet to find a provider that offers cost effective coverage for having to cancel a trip due to potential health risks, such as the H1N1 (swine flu) outbreak.

**IV. PROGRAM IMPLEMENTATION**

**Marketing and Recruitment**

As soon as the study abroad program has been approved, the Program Director’s (PD’s) next responsibility is to begin marketing the program to students. To ensure a high level of exposure, the program’s marketing materials should be ready for distribution at least 4-6 months in advance of the *course* start date to align with when students will register for classes for the next term. Based on your target student constituency, you may choose to utilize some or all of the following marketing methods:

* Program brochures
* Printed flyers
* Classroom visits
* Information table
* Targeted emails
* Announcement of program on Edgewood Express
* Student newspaper *On the Edge*
* Person to Person –tell everyone!!

Once the CGE has received an electronic version of the program brochure, it will be posted on the CGE study abroad website. When creating a program brochure, below is a checklist of recommended items to include in the publication. For a sample brochure, please see Appendix I.

* Program title and dates
* Program location
* Course number(s), credits to be earned, and degree requirements that could be fulfilled
* Pre-requisites or eligibility requirements, if applicable
* Faculty member teaching the course
* Link to syllabus, if available
* Program costs, including what is and what is not included in the program fee
* Excursions that are included
* Housing information
* Flight information and/or travel arrangements
* Application deadline, non-refundable deposit information and payment deadlines
* Appropriate disclaimers concerning potential changes to itinerary and fees
* Program leader’s contact information

Although it is ultimately the PD’s responsibility to recruit the minimum number of students to the program, the CGE will support recruiting efforts by promoting the program at CGE information sessions, distributing any brochures or printed marketing materials to students who come into the CGE, and directing interested students to the PD. Discuss with your Dean the minimum and maximum number of students needed to run the program (considering budgetary, logistical and safety issues).

**Application Procedures**

***Application Materials***

The CGE distributes a Study Abroad Application Template to PDs for all short-term study abroad programs (see Appendix F). By utilizing a standard template, the College is able to not only streamline the process for PDs, but also ensure that consistent information and qualifications are being assessed for admittance into the program. In addition, we recognize that each program will have unique variables. The PD can customize the template to it his/her program. For example, it may be pertinent to determine an applicant’s foreign language ability, depth of background in a particular subject area, etc. The Study Abroad Program ApplicationTemplate can be accessed from the CGE website.

The PD is responsible for review of applications and final selection of participants. Students will turn in all application materials to the PD by the posted application deadline. With the application, students must turn in a non-refundable deposit. Applications turned in after the posted deadline should only be considered if there are spots left to be filled after the initial round of applications are reviewed.

***Communication with Participants***

Within two weeks of the application deadline, the PD should submit to CGE a Program Participant Roster of those students who have gained admittance into the program and have paid the non-refundable deposit. The Program Participant Roster (see Appendix H) requires participants’ names, ID numbers, Edgewood email address, phone number and a color photocopy of the ID page of their passport. It is important that participants who need to apply for a passport do so well in advance of departure, as you may need their passport numbers to book in-country airfare and tours. It may even be necessary to ask students to pay to have the passport expedited. This is the reason that passport ID page is one of the documents requested at the time of application (see Appendix F). The CGE will utilize the Program Participant Roster to track students’ study abroad paperwork, notify them of pre-departure orientation information if applicable, register the group with the Department of State, and for reporting study abroad participation at Edgewood.

After receiving the Participant Roster, the CGE will communicate with the students primarily via the students’ Edgewood email about required documents, upcoming deadlines, and information regarding pre-departure orientation(s). The PD is responsible for communicating to the student participants about itinerary changes, payment schedules and deadlines, and course-related information.

***Required Documents***

Upon the receipt of the Program Participant Roster from the PD, the CGE will send all participants and the PD a link to the CGE website that contains the required study abroad forms and documents. The webpage includes the following documents:

1. International Travel Wellness Report
2. Study Abroad Student Code of Conduct & Responsibilities and Waiver & Release Form
3. WAICU Study Abroad Health Insurance Enrollment Form
4. Emergency Contact Information Form (electronically fillable)
5. CGE Pre-departure Orientation announcement (if applicable)
6. How to get a Passport handout

Forms #1-4 above are collected by the CGE by an agreed upon deadline. Copies of each student’s International Travel Wellness Report, Emergency Contact Information Form and a color copy of the identification page of their passport will be included in the Health and Emergency Information Packet given to the PD prior to departure (see Health and Safety in section III.)

***Review of Forms***

While the CGE collects the required forms from the participants, other offices on campus will be involved in reviewing certain forms to ensure there are no critical concerns with the student’s participation in the study abroad program. The Health Center Director will review the participants’ self-disclosed International Travel Wellness Report. The Health Center Director will meet with the student individually if he/she has a concern about the participant’s mental or physical well-being by participating in the study abroad program and will also report those concerns to the PD and CGE.

The Dean of Students Office will review the Study Abroad Student Code of Conduct & Responsibilities and Waiver & Release Agreement (see Appendix J) and notify the PD and CGE if there are any behavioral concerns with a student’s participation in the program.

**Pre-departure Orientation**

It is mandatory for all Edgewood students studying abroad to attend a pre-departure orientation. This orientation can be given by the CGE and/or the PD. Each semester the CGE provides a pre-departure orientation for all Edgewood students studying abroad for the summer, semester or academic year and this orientation is open to all short-term study abroad participants, as well. The CGE will communicate the dates to the PD prior to the course term, so that she/he can determine whether to require their students to participate in the CGE pre-departure orientation. To facilitate attendance, the CGE staff asks that the PD publish those dates in the course syllabus.

During pre-departure orientation, the CGE covers the following topics:

Paperwork:

* Collection of required study abroad forms and documents
* Handouts: (e.g. “What to pack” and “Strategies for Culture-specific Learning”)

How to be a cultural learner:

* Cross cultural simulation
* Stages of Cultural Adaptation and dealing with culture shock

Being a U.S. American abroad:

* Recognizing personal values as part of your cultural upbringing
* Scenarios to highlight U.S. American cultural tendencies

Health and Safety Abroad:

* Presentation from EC Health Center Director
* Typical health concerns abroad and immunizations
* Drug and alcohol use
* Creating a personal emergency plan
* Emergency scenarios

Because the CGE pre-departure orientation is not country-specific, the following topics will be the responsibility of the PD to cover in class or at an outside orientation/meeting:

* Culture of the host country
* Entry and exit requirements for host country (e.g. visa)
* Airline and travel itinerary
* On-site arrangements and services (i.e. housing, meals, ATMs, health care facilities, e-mail access, phone access, etc.)
* Review of course syllabus, evaluation criteria, & academic expectations
* Scheduled activities vs. free time; communicate when and where Edgewood responsibility ends before, during and after the program
* Discussion of student conduct policies (i.e. attendance policy, dress code, behavior expectations, and grounds for expulsion)
* Survival language training for programs in non-English speaking countries

**Health and Safety**

As a Program Director your responsibilities extend beyond the classroom. Students rely on you for all types of extra-curricular assistance as they adjust to a new, and sometimes stressful, environment. To help ensure the health and safety of the students participating on your program it is very important to take the following steps:

* Provide detailed information about the program and program site to participants so that they, and their parents/guardians/families, can make informed decisions concerning preparation, participation, and behavior requirements. Information should be included concerning the level of physical demands that will be placed on the students by the program activities, destination, etc.
* Have knowledge of students’ pre-existing medical and/or psychological conditions by reviewing the Health and Emergency Information Packet provided by the CGE (see next section.)
* Provide students with Center for Disease Control recommendations for immunizations (<http://www.cdc.gov/travel/>). The Director of Health Services in Predolin 208 can provide recommendations and review with students and PDs the health risks for specific regions.
* Monitor the U.S. Department of State travel information for the country(ies) the students will be visiting as part of the program. This can be done on-line at: <http://www.travel.state.gov/travel/travel_1744.html>

***Health and Emergency Information Packet***

Shortly before departure, the PD submits a final itinerary which should include dates of travel, flight information (airports, airlines, flight numbers, and times), daily schedule of activities and names, addresses and phone numbers of accommodations in each location. Based on this itinerary, the CGE will then distribute a Health and Emergency Information Packet to the PD. This packet will include the following items:

* Copies of each participant’s Emergency Contact Information form, International Travel Wellness Report and the passport identification page
* Emergency Contact Information Cards (wallet-size): Emergency contact information for key Edgewood College offices including CGE staff
* Edgewood crisis/emergency response procedures
* Incident Report Form (see Appendix L)
* U.S. Department of State Consular Information Sheet for countries to be visited (including location of Embassies and Consulates)
* Procedures and forms for replacing a lost or stolen passport
* WAICU Study Abroad Health Insurance Policy and ID cards

**V. EMERGENCIES AND CRISIS MANAGEMENT**

While study abroad programs offer our students rich educational and cross-cultural experiences, they also present a wide array of risks for students, Program Directors, and institutions. The following are some of the most common risks confronted during short-term international programs, some of which have legal implications:

* Sexual harassment
* Sexual assault
* Personal injury and accidental death (for example, drowning, defective conditions or facilities leading to injuries, horseplay related injuries)
* Unlawful discrimination
* Motor vehicle and pedestrian accidents
* Faculty and staff oversight of medical treatment (or lack thereof)

The safety and well being of Edgewood students, staff and faculty are of utmost importance, and the Center for Global Education (CGE) has developed guidelines and procedures to assist in managing crises during your study abroad programs. CGE has used the following principles in the development of our plans and will continue to use them to guide our decisions before, during and after a crisis:

* Concern for the health, safety and well-being of Edgewood students, faculty and staff
* Limiting Edgewood College’s legal liabilities
* CGE will exercise caution and restraint in deciding when and with whom information about emergencies should be shared.
* CGE will respond to emergencies by closely following the procedures described in this section of the handbook, except when otherwise directed by circumstances outside the College’s control.
* Conforming to the standards of ethical practice for education abroad as described in the Code of Ethics of NAFSA: Association of International Educators.

**What is an Emergency?**

*It is important that PDs understand the difference between “real” and “perceived” emergencies.* A true emergency is a situation that poses a genuine and immediate risk to the health, safety, and well-being of program participants and directors. Examples of real emergencies include but are not limited to:

* emergence of a serious medical condition
* accidents
* physical assaults
* criminal conduct or arrests
* disappearances
* coups
* natural and human-made disasters
* kidnapping

Examples of inconveniences or perceived emergenciesinclude:

* a lost wallet
* nonviolent interpersonal conflicts among group members
* flight delays or cancellations

While traveling, program participants may become ill. While it is important to address the illness and ensure the person receives proper care, an illness does not need to be reported to Edgewood unless the situation requires a student to be hospitalized and/or the illness is affecting the student’s ability to participate in or complete the program.

Even though the PD may consider a situation to be a *perceived* emergency, it might feel like a *real* emergency for the students and their family members at home. It is important to recognize such situations and handle them appropriately and in a timely fashion. The guidelines in this section will help you to gather the necessary information about a situation, decide on the appropriate course of action, and communicate with and enlist the help of your colleagues at Edgewood.

**Information for Participants Regarding Health, Safety, and Crisis Management**

The PD should prepare and distribute the information outlined below to all participants prior to departure. PD’s should encourage adult participants to share this information with family members/loved ones as appropriate and should directly share it with the parent(s) or guardian(s) for all minor participants.

* Complete itinerary – dates of travel, flight information (airports, airlines, flight numbers, times) names, addresses and phone numbers of accommodations in each location
* Emergency phone numbers to give to loved ones or guardians:
  + The PD’s cell phone number (optional)
    - The PD can decide if she/he wants to share his/her number with participant’s family members. Please communicate this decision with CGE.
  + Center for Global Education
    - Guardians/loved ones can call CGE’s main office phone Monday – Friday from 8:00am – 4:30pm; 608-663-2285.
    - Guardians/loved ones can call one of the CGE Co-Directors during the evenings (after 4:30 pm) and on weekends. They should leave a voicemail message for the Co-Director to return the phone call. (Andrea Byrum 608-332-2766 or Sara Friar 608-444-3335)
  + Campus Assistance Center (CAC)
    - If neither of the CGE Co-Directors is available, the guardians/loved ones should call the CAC emergency line at 608-663-4444 to report the emergency. The CAC will have contact information for the CGE and the group that is travelling.
* Expectations for communication during the study abroad program with family and friends who are at home (frequency and accessibility to internet and phone service). The PD should determine these expectations. CGE recommends providing at least some time and access for students to contact guardians/loved ones upon arrival to the program site. If this minimal level of communication will not be feasible, make sure students know this in advance.
* Edgewood’s expectations and student responsibilities during travel (see the Study Abroad Student Code of Conduct & Responsibilities and Waiver & Release Agreement—Appendix J).
* Students should have the following information about health and safety:
  + Detailed information about the program and program site concerning the level of physical demands that will be placed on the students by the program activities and the destination. Remember to consider the host country’s terrain, climate and altitude.
  + Country-specific risks should be discussed during in-class orientations. Identify key known risks and dangers associated with the host country/region and the type of activities included in the program. We also recommend that you research the host country’s recent history and identify areas of potential hazards and emergencies, such as natural disasters, environmental (pollution, water & air contamination), medical (accidents, injuries, epidemics), technical (communication system failures, power failures), and socio-political (civil and political unrest, riots, military coups) issues.
    - Suggested resources:
      * U.S. Department of State’s website <http://travel.state.gov> (includes: Country Background Notes, Consular Information Sheets, Public Announcements, Travel Alerts and Travel Warnings)
      * Overseas Security Advisory Council (OSAC) website [www.osac.state.gov](http://www.osac.state.gov)
  + Study abroad health insurance policy (see Insurance Requirements Section)
  + Information about travelling with prescription medication (bring adequate supply and proper documentation)
  + Recommended and required vaccinations as recommended by the Center for Disease Control (CDC) [www.cdc.gov/travel](http://www.cdc.gov/travel) and the Director of the College’s Health Center.
  + Emergency Contact Information Card (issued by CGE as part of Health and Emergency Packet)

Participants should carry the emergency card with them throughout the duration of travel. The cards should be filled out to include the following information or other information as appropriate:

* + - PD’s name and phone number
    - Hotel name, address, and phone number
    - Local hospital name and address
    - Local taxi service name and phone number
    - Edgewood contact name and numbers in case something happens to the PD
    - 911 equivalent(s) in host country
    - Nearest U.S. Embassy address and phone number

**Documents, Information and Tools That PDs Should Travel With:**

* The Health and Emergency Information Packet that CGE will assemble and give to all PDs prior to departure. The packet includes:
  + Copies of each participant’s Emergency Contact Information form, International Travel Wellness Report and his/her passport identification page
  + Emergency Contact Information Cards (wallet-size): Emergency contact information for key Edgewood College offices including CGE staff
  + Edgewood crisis/emergency response procedures
  + Incident Report Form (see Appendix L)
  + U.S. Department of State Consular Information Sheet for countries to be visited (including location of Embassies and Consulates)
  + Procedures and forms for replacing a lost or stolen passport
  + WAICU Study Abroad Health Insurance Policy and ID cards
* Program Participant Roster (includes names, ID numbers, Edgewood email address, and their cell phone numbers; if students are staying with host families include host family name, address, and phone number)
* An international cell phone.
* List of organizations, other study abroad programs, and other contacts that the PD has developed who could be a resource during an emergency (names, addresses, and phone numbers)
* List of host country hospitals, clinics, police departments
* Fanny pack first aid kits can be checked out from the College’s Director of Environmental Health and Safety.

**Ensuring Program Leadership during Emergencies**It is impossible to prepare for every type of emergency that could arise during a study abroad program. For the most part, this handbook is aimed at preparing the PD to handle emergency situations, but we must also prepare for situations in which the PD is incapacitated. Participants and other Edgewood colleagues must have some level of preparation in responding to emergencies. PDs should consider the following questions:

* What will happen if the PD is injured or unable to perform her/his duties during the program? Is there someone else onsite or at Edgewood who could travel to the location and take over the program? Or is there someone who could provide necessary support from Edgewood’s campus on very short notice?
* Will traveling students know what to do, where to go, and whom to contact if the faculty member is incapacitated or unavailable during any part of the trip?

**Emergency Communication Guidelines**

**The PD’s first priority will be to respond to the immediate emergency on site and ensure that all participants and PDs are safe and have/are receiving the necessary medical attention.** Once the immediate situation is under control, the PD should use the guide below to communicate with Edgewood personnel.

* Center for Global Education is the first point of contact.
  + When an emergency arises Monday – Friday, 8:00am – 4:30pm the PD should contact the Center for Global Education’s main office phone at 00-1-608-663-2285.
  + When an emergency arises during evenings (after 4:30pm), weekends, and official college breaks, the PD should contact one of the CGE Co-Directors. If the Co-Director does not answer the phone, please leave a voicemail message for the Co-Director to return the phone call. (Andrea Byrum 00-1-608-332-2766 or Sara Friar 00-1-608-444-3335)
* Campus Assistance Center (CAC) is the alternative point of contact if the CGE staff is unavailable.
  + If neither of the CGE Co-Directors is available, the PD should call the CAC emergency line at 00-1-608-663-4444. Please note that this is a designated emergency line at the CAC and is not the standard phone line for the college’s front desk. If nobody is available to answer the emergency line at the CAC, the call will be automatically forwarded to campus security. Campus security will answer their phone 24 hours a day, 7 days a week, including when the college is officially closed for breaks. Both the CAC and Security will know how to set the phone tree below into action.

When the PD contacts the CGE Co-Director, she/he should address the following concerns to the best of her/his ability:

* Basic description of the situation and names of participants who have been affected
* What is the current physical and psychological condition of the affected participant(s)?
* What is the imminent risk to participant(s) if they remain where they are?
* Have the individual(s) listed as emergency contacts for the affected participant(s) been contacted? If not, will the students be able to contact them soon or should the CGE contact them?
* Are all program participants, whether directly involved or not, aware of the emergency? How are they responding /coping?
* Are adequate food, water, and medical attention available?
* Is adequate and secure housing available? How long will this housing be available? What other appropriate housing options are available?
* Should the program continue or be cancelled? What adjustments need to be made to the itinerary?
* Should the affected participant(s) return to Edgewood? How will they return? Who will cover the expenses of return travel if it is separate from the group?
* Does another EC staff/faculty need to join the group on-site?

Once the CGE staff is notified of the situation, they will start the following phone tree:

* + Office of Dean of Students
  + Students’ Emergency Contact if she/he has not already been contacted by the student
  + Study abroad health insurance provider (if a medical emergency has occurred)
  + Dean of Appropriate School within the College
    - The Dean will contact the Chair of the Department and/or the PDs immediate supervisor
  + College’s Counseling Services (as appropriate)
  + College’s Campus Ministry (as appropriate)
  + College’s Office of Public Relations (as appropriate)

**Incident Reports**

After the PD has handled an emergency to the point that all involved have received immediate care, communicated with the appropriate Edgewood personnel, she/he should submit an incident report to the CGE as soon as possible. See Appendix L for the Incident Report Form. CGE requests that PDs complete incident reports for all emergency situations and for other, less serious, situations such as: serious student behavioral problems, disciplinary issues, academic misconduct, complaints of harassment or discrimination, and other violations of campus policies or procedures by participating students, faculty or staff. While it is difficult to predict what situations will arise and which ones will be serious enough to warrant an incident report, more documentation is always better than too little. The incident reports will provide a good source of written documentation for the College and will be used for CGE to learn more about the challenging situations that PDs deal with during study abroad programs.

**VI. PROGRAM EVALUATION**

**Participant Evaluations**

Within one month of returning from abroad, the PD will administer and collect a program evaluation from the program participants. The evaluation should allow students the opportunity to give feedback on all parts of the study abroad program. A Participant Program Evaluation is included in the Appendix for PD’s to use as-is or as a template (see Appendix M).

**Post-Program Evaluation Meeting**

Within one month of returning from abroad, the PD will schedule a meeting with CGE and appropriate Chair/Dean/Supervisor to discuss and evaluate program strengths and potential areas for improvement. The results of the Participant Program Evaluations will be brought into the discussion. The goal of this meeting is to ensure both continual improvement and future success of study abroad programs offered through Edgewood.

**VII. APPENDICES**