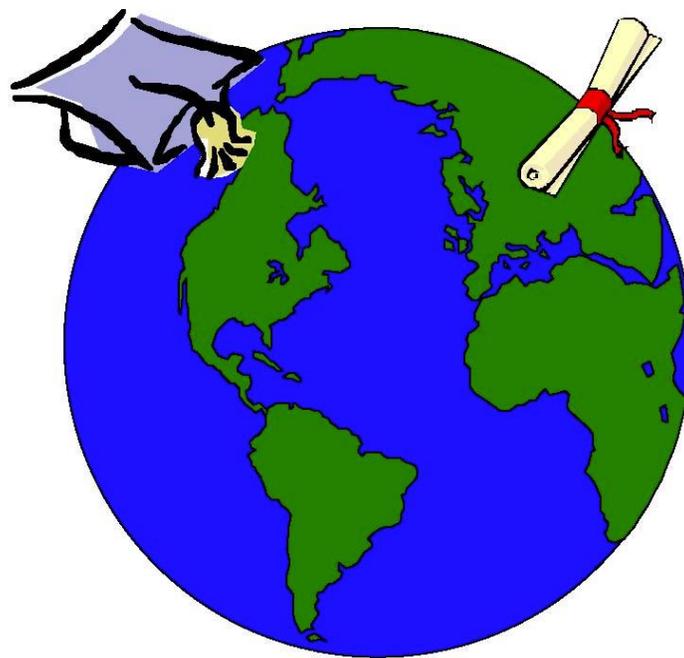


FACULTY GUIDELINES

FOR

DEVELOPING TRAVEL COURSES



2013-2014

International Programs and Services

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PREFACE

For the past decade WCU has been a leader in providing Study Abroad opportunities for its students. Well known for its semester and year long international student exchange program, the university also provides opportunities for faculty members to offer travel courses or travel as part of a course. International Programs and Services (IPS) has also assumed responsibility for domestic travel courses as well. This document serves as a guide for WCU faculty members as they plan, advertise, recruit for and teach their domestic and overseas travel courses.

There are various types of faculty-led travel courses**. The office of International Programs and Services can assist faculty and departments with many of these:

1. Faculty taught course(s) in domestic locations;
2. Faculty taught course(s) in overseas locations;
3. Faculty taught course(s) at overseas partner institution;
4. Faculty taught course at overseas partner site (institution/third party provider) with students taking intensive language or other courses;
5. Faculty chaperoned group of students to overseas partner institution (institution/third party provider) to learn intensive language and culture;
6. Semester course that includes a trip abroad;
7. Faculty chaperoned group of students participating in cultural activities with no course credit attached.

** See Attachment 1 for more detailed information

A REVIEW OF ROLES

Overseas and domestic travel courses are planned, implemented, and administered through cooperation between the course instructor and his/her department and International Programs and Services (IPS). Each of these entities has specific roles in the process. This section outlines these roles and responsibilities.

A. Department: Travel courses are planned within the department but are built in Banner by IPS. Both the department head and the college dean must approve overseas and domestic travel course syllabi before they can be built and advertised by IPS and the faculty member. For three-hour travel courses, instructor compensation will be determined by formula based on rank (see page 13 for details). No travel course will award more than three hours of course credit unless the course is listed as a 6-hour course in the catalog. For this type of 3-hour or 6-hour course, there is no tuition. For courses that encompass a travel component plus significant additional course requirements before or after completion of the travel, a total of up to six hours of course credit may be awarded to students by having them register for one three-hour travel course (at no tuition cost) and one three-hour co-requisite course (at appropriate residential tuition rates). Faculty stipend for the travel course will be calculated based on rank (see page 13); the co-requisite course will be classified as a Contingency Course and salary will be determined based on the formula outlined in APR 19.

B. Faculty Member: The instructor is responsible for designing the course, writing the syllabus, seeking approval from the department head and dean, and planning the trip details using in-country resources or a third-party provider. In conjunction with IPS, the faculty member will develop the student and faculty budgets, and provide IPS with a risk management plan. The faculty member is also responsible for selecting student participants, providing IPS with a list of student ID numbers, names, dates of birth, and collecting and forwarding to IPS all relevant faculty and student information forms, including copies of student passports if traveling overseas, no less than one month prior to trip departure. Please follow the timeline as detailed in Attachment 18.

C. International Programs and Services: IPS works with the Offices of the Provost, Financial Aid, Controller, Admissions, Student Community Ethics, Bursar, and Registrar to facilitate faculty-led travel courses. IPS cooperates with the faculty member to build courses in Banner, facilitate course advertising, trip logistics, and student registration. IPS will also provide a pre-departure orientation for all student groups about the culture of the destination (where applicable), student judicial policies, and health and safety while traveling.

D. Participating Student: The student is responsible for completing the student application and all paperwork required for the travel course in a timely manner, contacting the Financial Aid Office if eligible and seeking financial aid for the travel course, and attending the pre-departure orientation session and any other faculty-coordinated meetings associated with the course. Students with delinquent accounts and those who do not submit the deposit on time cannot participate in the travel course. See Attachment 17 for student responsibilities.

FACULTY PLAN YOUR COURSE

1. Begin planning your trip at least 18 months in advance in order to give yourself enough time to contact overseas or domestic sites, third-party providers, or work with IPS-established overseas partners.
2. **As part of WCU-approved risk management, each domestic and overseas travel course must have a primary and secondary instructor. The secondary instructor may be a WCU faculty member or a staff member of a host institution or third-party provider, for example a tour company, language center, or partner university.**
3. Work with your department head to determine which existing or new course would benefit from a domestic or international travel experience, by either complementing existing course content or adding a service learning component.
4. Travel costs should be kept as low as possible, to ensure greater accessibility and participation. Student participants are paying all student and faculty costs associated with the trip.
5. Submit the following forms to appropriate offices:
 - a. Faculty Application for WCU Travel Course and requested attachments to department head and dean. Once the travel course is approved within the college, please submit these documents to IPS for review, no later than October 15 (or September 15 if you wish your course to be promoted at WCU's annual Study Abroad Fair).
 - b. Submit student liability and emergency contact forms (Attachments 12-14) and copies of student passports if traveling overseas to IPS by November 15
6. Concerning student eligibility for financial aid, the course needs to start before June 30 (even though the travel may commence later) and students need to earn a minimum of 6 hours of credit during the summer session from the travel course or a combination of summer courses. In order to receive financial aid, students need to provide the Financial Aid office with the beginning and ending dates of THE COURSE, since the travel component of the course may differ.
7.
 - a. The department head will work with the faculty member to ensure that the academic rigor is achieved in the travel course. The Provost's Office may also review syllabi to evaluate academic rigor of proposed courses.
 - b. The department head will confer with the college dean about the feasibility and academic appropriateness of offering the course.
 - c. Any questions about country safety should be directed to IPS before the course is approved.
8. There are a number of forms that need to be completed and submitted at the times noted in Attachment 18. Faculty Applications for WCU Travel Courses not submitted by the due date will be considered for the following summer.
9. Faculty members must register your travel plans with the Department of State through their free online service at http://travel.state.gov/travel/tips/registration/registration_4789.html.

FACULTY PLAN TRIP DETAILS: OVERVIEW

1. Identify in-country resources such as accommodations, ground transportation, and sites/agencies/universities to visit.
2. Identify a reliable third-party provider if appropriate. Work with IPS on vetting such providers. If working with a third party provider, copies of all relevant contract information should be provided to IPS along with course approval forms.
3. **Determine the current costs, if any, for travelers to obtain guest visas for entering your country destination by consulting that nation's embassy website.
4. **Determine which vaccines are required and/or recommended by the Centers for Disease Control and Prevention for individuals traveling to your specific destination by consulting the CDC's website at:
<http://wwwnc.cdc.gov/travel/destinations/list.aspx>.
5. Develop budgets—see attached budget templates. **Be sure to include the costs of any visas and necessary vaccinations in the student and faculty budgets. Estimates relating to the costs of vaccinations can be obtained by contacting local area health departments such as the Macon County International Travel Clinic at (828) 349-2081 or the Buncombe County Travel Clinic at 828-250-5096.
6. Submit all required attachments to department head, dean, and then upon their approval, to IPS.
7. Once course is approved by IPS and the Provost Office's Designee, advertise the travel course. IPS will assist with this task.
8. Collect student information sheets and select student participants. Develop selection criteria and processes based on interpersonal, teamwork, and academic skills necessary to complete course objectives while traveling. Forward student paperwork, including copies of student passport photo pages if traveling overseas, to IPS. **MAKE EITHER PAPER OR DIGITAL COPIES OF THESE FORMS TO TAKE WITH YOU ON THE TRIP.**
9. Make sure that an adequate number of students have submitted student paperwork and passports. IPS will confirm with the Bursar's office whether or not students have paid the required \$500 course deposit prior to them being registered for the course.
10. Distribute Attachment 17 to students
11. Make sure students pay associated fees to OneStop. Alert students to the fact that any outstanding fees will be encumbered with trip deposits so they must pay parking, library fees, etc. before making trip deposits.
11. In conjunction with IPS, plan pre-departure orientation for students.

IPS ASSISTANCE FOR FACULTY MEMBERS

1. Conduct meetings and workshops with faculty members;
2. Advise in developing travel logistics and budgets. IPS is not a travel agency. Faculty members are responsible for making travel, accommodations, and site arrangements. If the faculty member is teaching at a partner institution, IPS will assist with contacting the partner and making appropriate arrangements;
3. Build the course in Banner and assist with course advertising;
4. Purchase group health insurance for trip participants, unless such insurance is purchased through an educational tour company which is coordinating the class' travel;
5. Conduct pre-departure orientation with faculty and students;
6. Maintain files on the students during the travel course and answer questions from parents and others about the status of those students while the groups are traveling;
7. Work with faculty to receive a travel advance, or within 30 days of returning to the US and after receiving proper invoices for travel expenses from the instructor, IPS will ensure that the invoices are forwarded to Accounts Payable for processing;
8. Work with instructor to receive all course evaluations from participating students.

PARTICIPATING STUDENTS

1. **Fill out and submit all required forms to your professor no later than November 15th:**
 - a. Student Application For Travel Courses (see Attachment 12);
 - b. Student Consent for Release of Information (see Attachment 13);
 - c. Assumption of Risk Release/Waiver of Claims (see Attachment 14).
2. Submit any additional requested forms to course instructor, third-party provider and/or host institution as required.
3. Pay all deposits and fees by specified due dates:
 - a. **Travel course deposit of \$500: due by February 15th (or by date indicated for trips taking place outside summer session time frame.)**
 - b. **Final course payment: due by April 1st, or by date indicated for trips taking place outside summer session time frame** (unless on financial aid). If you are on financial aid, consult with the Financial Aid office about procedures that must be completed and forms that must be submitted in order to obtain financial assistance in covering the cost of the trip. ***All participants should be aware that student loans are the only form of financial aid available to cover the cost of travel courses during the summer.***
4. If you are participating in a group tour sponsored by an educational tour company, you must order travel insurance through your tour company. This should be done no less than one month prior to your departure date or it will be ordered on your behalf through HTH Worldwide Insurance and be billed to your student account.
5. Obtain all necessary vaccines. Be aware that some vaccines require multiple doses over a period of weeks or months.
6. Attend ALL pre-departure orientations scheduled by the faculty member and IPS.
7. Abide by all relevant guidelines pertaining to appropriate behavior while preparing for and participating in the travel course:
 - a. The WCU Code of Student Conduct
 - b. The course instructor's specific guidelines
 - c. Relevant laws within the host country
 - a. Policies and procedures of third-party providers and/or host institutions;
8. Submit a course evaluation at the conclusion of the program;
9. If there is a transcript from the host institution, submit it to IPS with the course evaluation sheet in order to receive credit for the course;
10. Have fun and learn a lot!

ATTACHMENTS

**ATTACHMENT 1
EDUCATIONAL TRAVEL MATRIX AND APR 20**

Educational Travel Matrix

| | Non-state funded travel course (ex: entire course content is covered away from WCU campus; OR some course content covered prior to/after return from travel course destination where significant portion of course content is taught) | International Travel Partnership course (ex: entire course content is taught overseas by employees of partner institution) | International/domestic partnership course (ex: students earn credit for 2 courses, one taught by WCU faculty at a partner institution and the other taught by the staff of the partner institution) | State funded travel component course (ex: students register for semester-long course with travel taking place during or after the semester) |
|--|---|--|---|---|
| Travel is majority of course | Could be | X | X | |
| Travel is less than 50% of course | Could be | | | X |
| Students pay for faculty travel expenses/salary or Partnership counselor | X | X (Partnership Counselor) | X | Yes (Indirectly if using a 3 rd party provider) |
| Faculty travel paid by 3 rd party provider | Could be | | | Yes or No |
| Established as a contract course | X | X | X | |
| Administrative Processing Charge | \$200 (\$50 if using 3 rd party provider) | \$200 | \$200 | \$100 for fall/spring term travel; \$50 if using a 3 rd party provider |
| Students pay tuition | | Maybe | Maybe | X |
| Limited to 3 credit hours | X | X | X | X |
| Billing done through Banner | X | X | X | X |
| Managed through IPS | X | X | X | X |
| Course taught by international partner on partner's campus | | X | X | |
| Second course is taught by WCU instructor on partner's institution | | | X | |
| Students charged international program cost | | Maybe | Maybe | |
| Course is established as a regular resident credit course | | | | X |
| SCHs are earned | | | | X |

APR 20: Travel Course and Travel Component Course Guidelines

There are three educational travel course categories that involve educational travel:
NON-STATE Funded Travel Experience Courses (courses where students pay for faculty instruction/travel expenses)

A. Non-State Funded Travel Course (travel experience constitutes the majority of the course AND students pay for faculty instruction/travel expenses)

- course is established as a contract course* regardless of term
- course is managed and funded through International Programs and Services (IPS) in 103 Travel Course Account
- student billing for travel experience will be done through Banner and students are charged \$200 administrative cost (\$50 if third party provider is utilized)
- If a 3rd party provider is involved, a portion of the billing may be through Banner

B. International Partnership Course (course is taught by international partner--- hosted on partner's campus AND student pays for International Partnership Course Counselor—i.e. USI 421 or USI 395)

- Course is established as a contract course* and managed through IPS (regardless of term) in a 103 Travel Course Account.
- Student billing for travel experience will be done through Banner and students are charged \$200 administrative cost.
- Students may be charged international program cost determined by the international partner in negotiation with IPS at WCU.

C. International/Domestic Partnership Course (one course is taught by WCU instructor at international partner's campus AND student pays for faculty instruction and travel)

- Course is established as a contract course* and managed through IPS (regardless of term) in a 103 Travel Course Account.
- Student billing for travel experience will be done through Banner and students are charged \$200 administrative cost
- Students are charged international program cost determined by the international partner in negotiation with IPS at WCU.

STATE FUNDED Travel Component Course

State Funded Travel Component Course (travel experience constitutes less than 50% of the course; students do not pay for instructor/assistant instruction, but do pay for instructor/assistant's travel.)

- Course that encompasses a travel experience, but the predominant work of the course is done in addition to the travel experience.
- There are multiple discipline specific course meetings (online or face to face) that constitute the course. The content of these meetings go well beyond travel orientation.
- There is extensive time spent on planning the trip, including booking transportation, lodging, and setting up curriculum
- Course is established as a regular course in fall, spring and summer
- Instructor pay is funded by the college (or part of load) in fall and spring, funded by summer session in summer

- Instructor/Assistant travel expenses are paid by third party provider or by students through use of TRVL course charge that is posted to students' accounts.
- Travel experience is managed by IPS
- If a faculty member wants reimbursement for meals and travel not provided by the 3rd party provider then these expenses need to be itemized and the amount predetermined to be added to the students' cost.

*Travel activity/courses established as contract courses do not earn Student Credit Hours and therefore do not generate state funding—Students earn credit, but students will not normally be charged the regular tuition rate in contract courses.

To establish a Travel Course or a Travel Component Course a faculty member will need to complete the appropriate forms from International Programs and Services---developing a budget encompassing student and faculty travel expenses and compensation. This must be submitted by October 15th in order to receive approval. Every effort should be made to itemize all the specific costs for the trip---for the faculty member as well as the student. Students/participants may not be charged for equipment that will become the property of WCU and used for additional WCU activities. Students may only be charged for the faculty member's instructional compensation and travel expenses (if applicable) as well as the use or rental of equipment and services pertaining to the experience.

Enrollment Management for Travel Course or Travel Component Course:

Each faculty member will work with International Programs and Services to establish an enrollment minimum for the activity/course. A date will be set for obtaining this minimum. In the event the targeted enrollment is not reached, the travel course will be cancelled or the instructor/assistant compensation will be prorated according to the number enrolled. The specific agreement concerning the compensation structure will be established by the department head and dean in consultation with International Programs and Services and the faculty member prior to establishing the travel activity/course.

Credit Hours for Travel Course:

Each travel course will be designated as either for credit or not for credit. Participants will not have the option to get credit if the activity is established as “not for credit” and vice versa.

NON-STATE Funded Travel Courses established as Contract Courses:

If the course is being established as a contract course, the students will not normally be charged the regular tuition rate. Participants in both contract and tuition based courses will be required to pay an administrative processing charge of \$200 (\$50 if using a third party provider). A portion of this fee will be deposited into the 103 account and a portion will be deposited into the 102 Summer Session Account.

Note: State Funded Travel Component Courses will charge the students a \$100 administrative cost (\$50 if using a 3rd party provider) and may also charge students the cost of faculty travel expenses that are not provided by 3rd party providers.

Educational Travel (instructor travel expenses compensated through external agency):

If the travel arrangements are being made through an educational tour company, faculty members will indicate the name of the company on the forms and attach the terms of agreement with the company. Faculty will only be reimbursed for meals not covered by the Third Party Provider. The rate of reimbursement will be the Out of State per diem rate.

Educational Travel (instructor travel expenses not compensated through an external agency):

Every effort should be made to be as specific and accurate as possible when communicating the total cost of the travel experience to the student. The per diem for the faculty member will be compensated using out of state rates.

| | | |
|--------------------|--------------------------|-----------|
| Out of State Rate: | Meals | |
| | Breakfast | \$8.00 |
| | Lunch | \$10.45 |
| | Dinner | \$20.30 |
| | Total per day for meals: | (\$38.75) |
| | Hotel: | \$75.60 |

Educational Travel Course Instructor/Assistant Compensation:

Each travel course will have an instructor of record as well as an assistant instructor. If a faculty member is using a travel company s/he may count the tour guide as his/her “assistant instructor.” Unless otherwise approved by the department head and dean, credit assigned to a travel course will be no more than 3 credit hours.

There are two different categories for travel experiences in terms of instructor compensation:

Travel Course: Course that is predominantly taught through the travel experience with minimal expectation of students apart from the travel experience.

The instructor of record will be compensated according to the following rate (unless course is part of the faculty member’s load).

| | |
|--------------------------------------|------------------------|
| Part time/Fixed Term: Masters Degree | \$900 per credit hour |
| Terminal Degree | \$1000 per credit hour |

| | |
|--------------------------------|------------------------|
| Full time: Assistant Professor | \$1000 per credit hour |
| Associate Professor | \$1125 per credit hour |
| Full Professor | \$1250 per credit hour |

Assistant Instructor compensation will be at the following rate.

\$500 per credit hour (maximum compensation per travel course is \$1500)

International Partnership Course Counselor (non-instructional) will be compensated \$500 per week of travel experience.

State Funded Travel Component Course

The instructor of record will be compensated for the course according to the regular summer compensation structure provided in APR 19 if the course is conducted in the summer—paid for out of summer session funds (through IPS as appropriate)—see summer pay rates for full time and part time faculty below. For faculty members who teach an overload course which involves travel, IPS will

provide a stipend (amount to be determined by IPS). If the course is taught as part of the faculty member's load there is no additional instructor compensation.

Establishing Contract Courses in Banner:

Travel courses will be built in Banner by the Office of International Programs and Services. Once the courses are in Banner, IPS will notify the Bursar's Office so that the appropriate costs can be attached to each section. Costs must be attached before any registration is permitted. IPS should make every effort to have the courses built prior to Fall Advising Day so the courses can be marketed during the advising period. Refer to the "How to Build Travel Courses in Banner" documentation published by the Registrar's Office.

Registration Process for Travel Courses for Credit (Contract Courses):

IPS will send the names of any students who need to be registered for summer travel courses to the Registrar's Office. Because registration and partial payment is required before web registration turns on, web registration for travel courses is not supported. All registration must be handled manually within the Registrar's Office. IPS will notify the Registrar's Office and the Bursar's Office if a student needs to be dropped from a travel course. All travel course registration/drop activity requires the approval of IPS.

Process for Students to Make Payments:

Once the cost of the course is determined and a minimum number of participants are established, the cost of the Travel Course or the Travel Component Course will be marketed to students. Upon registration, the charges will appear on the students' accounts. Students will make cash payments at the OneStop and will communicate that they are making a "Travel Course Payment". These payments will be posted to their individual accounts using detail code 9113 which only pays charges for the term in which the payment is posted. Students may make general credit card payments in Bill+Payment through MyCat, but they will have to contact the OneStop after the payment is made to recode the payment to a Travel Course Payment. Students should abide by the process for payment. ***Faculty members should not collect payments from students.***

Monitoring and Reporting of Students:

A Banner report will be available in Report Portal that the instructor and International Programs may use to monitor participation and payment. The CRN of the course and the term will be input. The output will be a list of the students, the total cost of the course, the total payments that have been made, and the balance due to each student. **Students may not take the trip unless the full amount of the course has been paid.**

**ATTACHMENT 2
FACULTY APPLICATION FOR WCU TRAVEL COURSE
COVER SHEET**

Routing: **A.** ____ **ACADEMIC DEPARTMENT** completes part A

B. ____ **INTERNATIONAL PROGRAMS AND SERVICES** uses A & B to complete Request for Course Approval (RPA)

A. ACADEMIC DEPARTMENT _____

COURSE INFORMATION:

(For multiple courses, please fill out separate forms)

Course Title and #: _____ Course Credit Hours: _____

Instructor/Chaperone name, rank, and WCU employee (92) #: _____

Secondary Instructor/Chaperone's name, rank,
and WCU Employee (92) #: _____

Course Credit provided by: WCU _____ Partner institution: _____

Course Site (city/country): _____ Dates of Course: _____

Does this course complement the department's curriculum? Yes _____ No _____

Total Estimated Student Cost for Course (subject to change): \$ _____

Total Cost for Faculty/Chaperone: \$ _____

Total Cost of Trip (including *all* participants and faculty/staff members): \$ _____

The above course has been reviewed for academic content and has my approval.

Department Head _____ Date _____

College Dean _____ Date _____

continued on next page...

IPS use only

B. INTERNATIONAL PROGRAMS AND SERVICES

IPS has reviewed the above information.

Assistant Director, IPS/Date

Provost Designee/Date

Fund #: _____

For multiple instructors, indicate name and compensation for each.

Name: _____ \$ _____

Name: _____ \$ _____

This form should reach **INTERNATIONAL PROGRAMS AND SERVICES** by *September 15* for summer courses being offered during the following calendar year.

INSTRUCTOR INFORMATION:

1. Primary Instructor: _____

Primary Instructor Phone: _____ Email: _____

Date of birth (for travel insurance purposes): _____

Driver's License # and State: (if a vehicle from State Motor Pool will be needed) : _____

2. Secondary Instructor: _____

Secondary Instructor Phone: _____ Email: _____

Date of birth (for travel insurance purposes): _____

Driver's License # and State: (if a vehicle from State Motor Pool will be needed) : _____

ACADEMIC OPTIONS:

___ Single course ___ Field trip that is part of an on-campus course

___ Chaperoned course at a partner institution

Will students enroll at an institution on site? ___ no ___ yes

If yes, host institution name: _____

ENROLLMENT INFORMATION:

Number of students: Minimum: ___ Maximum: ___

Open to non-WCU students*? ___ no ___ yes

** Non-WCU students, including high school students who are dual enrolled in WCU courses, must apply for admission to the university before enrolling in the course and must pay all associated fees. Dual enrolled high school students seeking course credit from their schools must receive prior approval from the school's administrators in order to participate in the course and receive academic credit.*

Criteria for participant selection (language/course pre-requisites, GPA other than standard, etc.):

LOGISTICAL ARRANGEMENTS:

Course Assistance:

Name, address, and contact information of third party provider or partner institution if assisting with the course logistics:

Services provided:

HOUSING:

___ Hotel ___ Residence halls ___ Homestays ___ Youth Hostels ___ Camping

MEALS: ___ provided ___ not provided

TOURS: ___ part of program fee ___ not part of program fee

MUSEUMS/THEATER/CONCERTS: ___ part of program fee ___ not part of program fee

INTERNATIONAL/DOMESTIC TRAVEL:

___ Arranged flight (instructor reserves flight for students/group)

___ Ground Transportation

___ Student arranged flight

___ Other: _____

COST/BUDGET:

Please attach typed budget sheets (see Attachments 5 & 6) and submit an electronic copy to International Programs in Word format using the included template.

VISA:

Will students of US citizenship or international students be required to obtain a VISA to enter the program country?

___ no ___ yes If yes, what is the current cost of a visa? _____ Please be sure to include this amount on both the faculty and student budget forms.

ATTACHMENTS: (to be submitted with completed proposal. Please make sure you keep all these materials in electronic format for later use.)

- Copy of Course Syllabus – should address course goals and objectives, academic goals and objectives, integration of site to learning objectives, importance of participation in all travel-course activities, and your personal goals in directing the course.
 - STATEMENT PERTAINING TO PHYSICAL FITNESS REQUIREMENT IN ORDER TO PARTICIPATE IN TRAVEL COURSES: All syllabi should include an honest, frank description of the physical activity involved in the travel course, along with a statement that students will be expected to be involved in all classroom activities. In the event that a student declines to participate or does not participate in group activities, their grade in the course may suffer or they may be returned home at their own additional expense without a refund of expenses previously paid.
- Course Budget – Travel fees must cover all student AND faculty expenses (see Attachments 3 – 6 for samples and templates). ***Please submit budgets in Word format using attached templates, as well as in hard copy, typed format.***
 - If international wire transfers will be requested in order to pay for services rendered to your group, please have your vendor(s) complete Attachment 7, the International Wire Transfer Request form with their complete banking account and mailing address information. Invoices written in a language other than English should have an accompanying English translation.
- Detailed Itinerary – Include any overnight excursions away from primary site and **specify location, duration, and contact information for each day that the group will be away from campus.**
- Course Information – included in this attachment.
- Location safety assessment- Identify potential risk factors specific to your site and the steps you are taking or will take to ensure students’ and your own health and safety (Attachment 9). Be sure to consider in-country travel arrangements. For international travel courses, consult the US State Department Travel Advisories (http://travel.state.gov/travel/travel_1744.html), the Centers for Disease Control and Prevention website for information on traveler’s health (<http://www.cdc.gov/travel/destinationList.aspx>), or similar resources.
- Policy 100 form authorizing out of country travel
- Export Control Training Acknowledgement and Confidentiality Agreement
- One-Time Certification University Owned Items and Software Temporary Export License Exemption

Signature of Course Instructor: _____ Date: _____
(Digital Signature Not Acceptable)

Submit to Claudia Bryant in the International Programs and Services, WCU, 109 Camp Building, Cullowhee, NC 28723. Phone: 828-227-7739; Fax: 828-227-7080

ATTACHMENT 4
COURSE/TRAVEL BUDGET SAMPLE
STUDENT COSTS

Course # and Title GIPSL 140 - Environmental GIPSlogy Credit Hours 3

Instructor(s) John Doe

Location of Trip San Salvador, Bahamas Travel Dates May 7 – 26, 2008

Required # of Students for Travel to be Cost Effective 10

| Student Fees Reported to Financial Aid | Amount | Comments | Pay to OneStop | Student Responsibility/Pay to 3 rd party provider |
|--|-----------|------------------------------|----------------|--|
| Airfare | \$1000.00 | | \$1000.00 | |
| Lodging (please note if meals included) | \$600.00 | Breakfast included w/lodging | \$600.00 | |
| Meals | \$300.00 | | | \$300.00 |
| Trip Cancellation Insurance | \$100.00 | | \$100.00 | |
| International Health Insurance | \$26.40 | 1.32 per day for students | \$26.40 | |
| Ground Transportation | \$30.00 | | \$30.00 | |
| Admission Cost for Events | \$200.00 | | | \$200.00 |
| Visa (Out-of-Country) | \$100.00 | | | \$100.00 |
| Passport | \$145.00 | | | \$145.00 |
| Special Clothing/Equipment | \$100.00 | Water gear rental | | \$100.00 |
| IPS Administrative Processing Charge** | \$200.00 | | \$200.00 | |
| Currency Fluctuation | \$50 | | \$50 | |
| Miscellaneous Expenses | \$250.00 | | | \$250.00 |
| Instructor/Secondary instructors' expenses (see Total from Attachment 3) | \$992.52 | \$9925.20/10= \$992.52 | \$992.52 | |
| TOTAL | \$4093.92 | | \$2998.92 | \$1095.00 |

It is particularly important that course instructors work with students who seek to receive financial assistance for travel, directing them to consult individually with a Financial Aid advisor. This should be well in advance of the commencement of the course in order to determine Financial Aid application deadlines and student responsibilities. Once IPS sends the finalized course travel budget to the Financial Aid Office, financial aid officers can work more easily with students in determining their financial aid package. Remember, **students must be enrolled in at least 6 credit hours overall in summer in order to receive financial aid AND the course must begin before the end of the fiscal year, July 1.**

**** IPS Administrative Processing Charge: Billed at \$200 for summer session travel course, \$100 for fall/spring semester travel course, or \$50 if working through a 3rd party provider for travel during any portion of the academic year**

ATTACHMENT 5

COURSE/TRAVEL BUDGET TEMPLATE FACULTY COSTS

Course # and Title _____ Credit Hours _____
 Instructor(s) _____
 Location of Trip _____ Travel Dates _____
 Required # of Students for Travel to be Cost Effective _____

PLEASE SUBMIT VIA WORD DOCUMENT USING THE TEMPLATE AND IN HARD COPY, TYPED.

Faculty Stipend & Travel Expenses – Please list cost per person in Comments section

| | Amount | Comments |
|--|--------|----------|
| Primary Instructor Stipend | | |
| Secondary Instructor Stipend | | |
| Total for Airfare (x 2 if applicable) | | |
| Total for Lodging (x 2 if applicable) | | |
| Total for Meals (x 2 if applicable) | | |
| Total for Trip Cancellation Insurance (x 2 if applicable) | | |
| Total for International Health Insurance (x 2 if applicable) | | |
| Total for Visa(s) (x 2 if applicable) | | |
| Total for Passport(s) (x 2 if applicable) | | |
| Ground Transportation | | |
| Local Mileage & Parking | | |
| Educational Supplies (specify) | | |
| Other (please list) | | |
| **TOTAL | | |

**** Please transfer total amount to last line of Student Budget form (Attachment 6)**

**ATTACHMENT 6
COURSE/TRAVEL BUDGET TEMPLATE
STUDENT COSTS**

Course # and Title _____ Credit Hours _____
 Instructor(s) _____
 Location of Trip _____ Travel Dates _____
 Required # of Students for Travel to be Cost Effective _____

| Student Fees Reported to Financial Aid | Amount | Comments | Pay to OneStop | Student Responsibility/Pay to 3 rd party provider |
|--|------------------|----------|----------------|--|
| Airfare | | | | |
| Lodging (please note if meals included) | | | | |
| Meals | | | | |
| Trip Cancellation Insurance | | | | |
| International Health Insurance | | | | |
| Ground Transportation | | | | |
| Admission Cost for Events | | | | |
| Visa (Out-of-Country) | | | | |
| Passport | | | | |
| Special Clothing/Equipment | | | | |
| **IPS Administrative Processing Charge | \$200/\$100/\$50 | | | |
| Currency Fluctuation | \$50 | | | |
| Miscellaneous Expenses | | | | |
| Instructor/Secondary instructors' expenses (see Total from Attachment 5) | | | | |
| TOTAL | | | | |

It is particularly important that course instructors work with students who seek to receive financial assistance for travel, directing them to consult individually with a Financial Aid advisor. This should be well in advance of the commencement of the course in order to determine Financial Aid application deadlines and student responsibilities. Once IPS sends the finalized course travel budget to the Financial Aid Office, financial aid officers can work more easily with students in determining their financial aid package. Remember, **students must be enrolled in at least 6 credit hours overall in summer in order to receive financial aid AND the course must begin before the end of the fiscal year, July 1.**

**** IPS Administrative Processing Charge: Billed at \$200 for summer session travel course, \$100 for fall/spring semester travel course, or \$50 if working through a 3rd party provider for travel during any portion of the academic year**

ATTACHMENT 7

International Wire Transfer Request

- Request must be received 7 business days prior to due date
- Cut off time for transfers is 2:00 pm
- Attach invoice to request
- Provide as much detail as possible

Required Information

Beneficiary Bank:

Bank Identifier Code (BIC)/SWIFT: _____

SWIFT/CHIPS/Account Number: _____

IBAN Number: _____

Bank Name: _____

Bank Address 1: _____

Bank Address 2: _____

Bank City, Country: _____

Beneficiary Account Number: _____

Beneficiary Name: _____

Beneficiary Address 1: _____

Beneficiary Address 2: _____

Beneficiary City, Country: _____

Currency: _____

Amount: _____

Invoice Number: _____

Reason: _____

Due Date: _____

Pay From:

Fund: _____

Account: _____

Requested By: _____ Date: _____

Approved By: _____ Date: _____

ATTACHMENT 8 TRAVEL COURSE ADVERTISEMENT

In consultation with IPS, produce and distribute advertising materials (posters, brochures, Web pages, etc.) which clearly indicate:

1. Title of course;
2. Dates of course (including any orientation meetings);
3. Location of course;
4. Any affiliated universities;
5. Curriculum description (including location of classes and WCU course numbers, titles, credit hours, graduation requirement fulfillment, etc.);
6. Instructor of course with contact information;
7. Travel cost (including a brief statement of what will/will not be included in that price);
8. Application procedures (admissions decision procedure, any additional application materials necessary, any prerequisites, any minimum or maximum student number requirements, application and payment deadlines, etc.);
 - a. Deadline for receipt of student applications by faculty member: November 15
 - b. Deadline for payment of \$500 travel course deposit: February 15 (or by date indicated for trips taking place outside summer session time frame)
 - c. Deadline for payment of travel course fees (except for students on financial aid): April 1 (or by date indicated for trips taking place outside summer session time frame)
9. The following sentence must be included in your brochure: "WCU reserves the right to cancel or alter the course format or to change costs in case of conditions beyond its control."

NOTE: In liability cases, course/travel brochures are viewed by the courts as legally binding contracts.

Very important! No publicity can be distributed until the above steps have been successfully completed!

ATTACHMENT 9

SAFETY ASSESSMENT GUIDELINES FOR FACULTY-LED TRAVEL COURSES & PRE-DEPARTURE SAFETY REPORT

The health and safety of students participating in travel courses is the highest priority of WCU. At WCU, as at many of our peer institutions, it is the responsibility of the course instructor to:

1. monitor the security of travel course locations;
2. assess travel courses to ensure student and faculty safety;
3. require attendance at IPS orientation and training sessions aimed at helping students and faculty minimize risks and respond appropriately to emergencies;
4. coordinate any crisis response related to travel;
5. collaborate with other university units to minimize and manage risks;
6. Keep IPS office informed of any emergencies.

A detailed itinerary with site contact information for each day that participants will be away from the WCU campus is an important part of risk management.

Because the University bears the brunt of the responsibility for student safety, the request for assessments, reviews, and reports is at the discretion of International Programs and Services, and it falls on IPS to cancel programs where security issues have not been adequately addressed. Furthermore IPS, in consultation with WCU Legal Counsel, GA Counsel, the faculty travel course leader, or any Third Party Providers involved, will determine the feasibility of carrying out travel courses in the event the destination country is placed on the Department of State warning list shortly before travel is to commence. Course cancellation is extremely rare, and would always be carried out in consultation with all relevant constituents. If a faculty member or student desires to appeal the ban or restriction on travel, he/she can appeal in writing to the Travel Abroad Appeals Committee, which will review all relevant information in making a determination as to whether or not a specific travel course will be carried out.

Routine Safety Assessment Practices

Every travel course instructor will be required to:

1. Read Faculty Guidelines, handbooks, and other materials provided by the office of International Programs and Services;
2. Attend training workshops provided by IPS;
3. Provide any information needed by IPS to carry out a safety assessment of a new course prior to program approval;
4. Provide any information required by a college-based review committee for an in-depth review, approximately once every 3-5 years;
5. Submit the Pre-Departure Safety Report to IPS one month prior to leaving, highlighting any security concerns;
6. Communicate with IPS if any incident occurs during the course;
7. Submit a debriefing report to IPS upon course completion every year, including any relevant incident documentation.
8. Ensure that all program participants at all times carry with them emergency contact cards detailing relevant health insurance policy/contact information and site location information for each location visited

continued on next page...

PRE-DEPARTURE SAFETY REPORT

WCU Course Title and #
And/or Host Institution Course(s) Title(s):

Location of Course: _____
Dates of program _____ to _____

| Instructor(s) | <u>Campus Address</u> | <u>Site Address & Fax #</u> |
|--|-----------------------|---------------------------------|
| 1. Name: _____ | _____ | _____ |
| Rank/status: _____ | _____ | _____ |
| Address: _____ | _____ | _____ |
| Telephone No: _____ | _____ | Fax: _____ |
| Preferred email address at site: _____ | _____ | _____ |

(If applicable)

| | | |
|--|-------|------------|
| 2. Name: _____ | _____ | _____ |
| Rank/status: _____ | _____ | _____ |
| Address: _____ | _____ | _____ |
| Telephone No: _____ | _____ | Fax: _____ |
| Preferred email address while at site: _____ | _____ | _____ |

For all instructors, regardless of destination:
Potential safety risks are: _____

Potential health risks are: _____

If there is a medical emergency, how will you and your secondary instructor handle this?

| | | | | |
|--|-----------------------------|--------------------------------|--------------------------------|---------------|
| <p>For international travel, I have:</p> <ul style="list-style-type: none"> a) visited the Department of State's website in order to obtain consular information about the travel course destination (http://travel.state.gov/travel/travel_1744.html) and to register with the US embassy there through the Smart Traveller Enrollment Program (http://travel.state.gov/travel/tips/registration/registration_4789.html); b) visited the Centers for Disease Control and Prevention's website (http://wwwn.cdc.gov/travel/destinationList.aspx) in order to obtain information about potential health dangers in the country; c) reviewed and am in compliance with Western Carolina's policy regarding Export Control of goods and technology: (http://www.wcu.edu/6800.asp) and I have reviewed the Human Resources department's Powerpoint presentation on Export Control. I have completed WCU's Export Control TRAINING ACKNOWLEDGEMENT AND CONFIDENTIALITY AGREEMENT (see Attachment 9). <p>All relevant information from these pages has been incorporated into my Emergency Response Plan and is detailed below.</p> <table border="0" style="width: 100%;"> <tr> <td style="width: 50%; border-top: 1px solid black;">_____ Primary Instructor</td> <td style="width: 50%; border-top: 1px solid black;">_____ Date</td> <td style="width: 50%; border-top: 1px solid black;">_____ Secondary Instructor/</td> <td style="width: 50%; border-top: 1px solid black;">_____ Date</td> </tr> </table> | _____ Primary Instructor | _____ Date | _____ Secondary Instructor/ | _____ Date |
| _____ Primary Instructor | _____ Date | _____ Secondary Instructor/ | _____ Date | |

ATTACHMENT 10
Western Carolina University Export Control
TRAINING ACKNOWLEDGEMENT AND CONFIDENTIALITY AGREEMENT

In consideration of my employment and/or continued employment at Western Carolina University ("WCU"), I agree as follows:

1. As an employee/student employee of WCU, I understand and acknowledge that in the course of business, I may be assigned the responsibility of exporting goods, technology, and related technical information that may be restricted from leaving the shores of the United States, or I may transmit restricted information (oral, written, electronic or visual disclosure) within the United States to an individual other than a U.S. citizen identified by the federal government as a threat to our homeland security or economic status,
2. I understand that Federal Export Control Regulations prohibit transactions and disclosures by university employees with countries, entities and individuals subject to boycotts, trade sanctions and embargoes,
3. I understand that an export control license may be required by the Department of Commerce or State if information, technology, items or services are listed as "sensitive or controlled" by federal law,
4. I understand that planned visits by foreign nationals require prior approval by the International Programs and Services and Provost Offices according to WCU Policy 100 (<http://www.wcu.edu/chancellor/index/UniversityPolicy/Policy100.htm>),
5. I understand that University-owned technology including laptops, PDAs (including tablets), cellphones, and digital storage devices are subject to export control regulations. However, if certain criteria are met a Temporary Export License Exemption may be granted. The Certification from must be completed and filed with International Programs and Services prior to travel. Failure to comply with WCU policy may cause the owner of the computer to be taken to court, fined and/or jailed,
6. I understand that the admission and matriculation of students from embargoed countries require approval by the Office of International Programs and Services,
7. I understand the penalties for myself and WCU for failing to comply with the Federal Export Control Regulations. I am responsible for being familiar and complying with the WCU Export Control Plan and all related university policies (http://www.wcu.edu/WebFiles/PDFs/Research_Export_Control_8-2008.pdf),
8. Further, I understand that failure to comply with WCU's Export Control policies may constitute just cause for disciplinary action including termination of my employment, as well as criminal prosecution,
9. By my signature below I acknowledge that I have completed export controls awareness training, that I understand my responsibility in complying with the Federal regulations and procedures outlined in the WCU Export Control Plan.

Signature (Digital Signature Not Acceptable)

Supervisor Signature (Digital Signature Not Acceptable)

Printed Name

Department or Unit

ATTACHMENT 11
One-Time Certification
University Owned Items and Software

Temporary Export License Exemption

The export of tangible items, commercial software and encryption code is subject to export control regulations. The Export Administration Regulations (EAR), however, make an exception to license requirements for the temporary export or re-export of certain tangible items or software for professional use as long as specific criteria to which you are certifying are met.

This exemption is only required for WCU students, faculty, and staff traveling abroad with University-owned laptops, PDAs (including tablets), or cell phones or digital storage devices. This is not to be completed for individuals bring personally-owned equipment

Travel Information:

Destination(s): *(list all cities/countries to be visited)*

Detailed Description of Items to which this Certification applies.

By my signature below, I certify that:

1. I will ship or hand-carry the item(s) or software;
2. I will ship or hand-carry the item(s) and its software abroad ONLY either as a “tool of the trade,” for exhibition or demonstration; or for inspection, testing, calibration or repair to conduct Western Carolina University business
3. I will return the item(s) and its software to the US no later than 12 months from the date of export unless they are certified by me to have been consumed or destroyed abroad during this 12 month period
4. I will maintain the item(s) and software under my “effective control” while abroad (defined as retaining physical possession of an item or maintaining it in a secure environment, such as a locked hotel safe or a locked or guarded facility, or other secure environment)
5. I will not ship or hand-carry the item(s) or software for inspection, testing, calibration or repair to a country in *country group D:1* in the EAR (currently: Albania, Armenia, Azerbaijan, Belarus, Burma, Cambodia, China, Georgia, Iraq, Kazakhstan, Kyzgystan, Laos, Libya, Macau, Moldova, Mongolia, Russia, Tajikistan, Turkmenistan, Ukraine, Uzbekistan, and Vietnam)

6. I will not ship or hand-carry the item(s) or software into sanctioned countries (currently Iran, Syria, Cuba, North Korea, or the Sudan)
7. I will not ship or hand-carry any item(s) or software that includes encryption software not publicly available outside the borders of the United States

WCU Employee Signature: _____
(Digital Signature Not Acceptable)

Date: _____

“This material is adapted from original content found on [Stanford University’s Export Controls Page](#). We appreciate Stanford in granting us to permission to adapt its content for Western Carolina University’s benefit.”

ATTACHMENT 12

STUDENT APPLICATION FOR TRAVEL COURSES

Please complete separate Attachments 12-14 for each travel course for which you intend to register.

Travel Course: _____
Prefix # Section

Complete Name: _____
First Middle Last

Permanent Address: _____
Address City State Zip

Campus Address: _____
Address City State Zip

Phone Number: _____ Mobile Phone: _____

Email Address: _____

Student Identification Number: _____

Date of Birth (for insurance purposes): _____
Month Day Year

Gender: _____ Male _____ Female Major: _____

Student Status: _____ Fresh _____ Soph _____ Jr _____ Sr _____ Grad

Ethnicity: Native American/Alaskan Native _____ Asian-American or Pac Islander _____
African-American _____ Hispanic-American _____ Multiracial _____
Caucasian/White, Non Hispanic _____ Do Not Wish to Report _____

Are you a member of the WCU Honors College? Yes _____ No _____

Travel costs (includes airfare, transfers, housing, and insurance) = \$ _____

Travel costs are due by April 1 (unless covered by financial aid; Financial aid payments are made 9 days before trip departure).

Will you be applying for financial aid to cover the costs of this trip? _____ yes _____ no

Deposit: A \$500 non-refundable deposit is required by February 15 for pre-registration (or by date indicated for trips taking place outside summer session time frame.) This will be deducted from final travel costs.

If a travel course is canceled due to low enrollment, deposits for that course will be refunded.

I have read and understand the above information.

Signature (Digital Signature Not Acceptable)

Date

Name: _____

HEALTH STATEMENT

The purpose of this form is to help International Programs and Services and WCU to be of maximum assistance to you should the need arise during your domestic/international travel course experience. Mild physical or psychological disorders can become serious under the stresses of life while traveling. It is important that your course instructor and International Programs and Services be made aware of any medical or emotional problems, past or present, which might affect you in an unfamiliar study context. The information provided will remain confidential and will be shared with staff, faculty or health care professionals as may be necessary to ensure your health and safety.

If you answer yes to any of these questions, please give details of the condition and treatment. Use additional space at the bottom of the page if necessary. All responses will be kept confidential.

1. Do you have any dietary restrictions or known food allergies? Yes ____ No ____
If yes, please explain:

2. Do you have any physical, psychological or emotional disabilities or impairments which might cause hardship through change of diet, carrying luggage, or strenuous travel, or might otherwise affect participation in a travel program? Yes ____ No ____
If yes, please explain:

3. Do you have any allergies to medicine? Yes ____ No ____
If yes, please specify:

4. What current treatments or prescription drugs (including birth control) do you regularly receive?

5. Use this space if you feel there are any conditions (physical, psychological or emotional problems) or any other information of which we should be informed.

**ATTACHMENT 14
ASSUMPTION OF RISK
RELEASE/WAIVER OF CLAIMS
DOMESTIC/INTERNATIONAL TRAVEL PROGRAMS**

This is a legal document which includes a release of liability. Read it carefully before signing it.

I understand that if I am not permitted to participate in this travel experience, for any reason, by the University or any third party, at any time prior to departure, WCU is in no way liable for refunding any amount already paid on my behalf to any third party providers.

1. I have applied and have been accepted for participation in a Western Carolina University (“WCU”) travel course. I understand that I am not required to participate in this particular program but do so of my own free will
2. I understand that this program will expose me to many risks associated with domestic or foreign travel, [CHOOSE IF APPLICABLE] [residence in a foreign state], and participation in a study program conducted at that location. These risks include without limitation, food poisoning, depression, homesickness, theft, bodily injury and risks associated with public/political instability, and/or natural disasters
3. I acknowledge and understand the risks inherent in participating in the travel course. I understand that such risks cannot be completely eliminated
4. I voluntarily and expressly accept and assume all risks, hazards, and dangers inherent in participating in the travel course
5. I understand that I am solely responsible for the payment of any costs related to injury or property damage sustained through my participation in the travel course. I understand that I am solely responsible for maintaining adequate health and accident insurance coverage, for keeping current on the health advisories posted on the CDC and World Health Organization websites (<http://wwwnc.cdc.gov/travel/> and <http://www.who.int/en/>), and I certify that I have adequate insurance coverage
6. I hereby agree, for myself and on behalf of my successors, heirs, and assigns, that for the sole consideration of WCU allowing me to participate in the travel course, I hereby waive any and all claims and release, satisfy, and forever discharge from any and all actions, claims, damages, judgments, demands, rights, and causes of action of whatever kind of nature, arising out of all known and unknown, foreseen and unforeseen bodily and personal injuries or damage to property arising out of or related to my voluntary participation in the travel course
7. I further agree that for the sole consideration stated above I will not institute any legal or administrative proceedings against WCU and its Board of Trustees; the University System of North Carolina (“UNC”) and its Board of Governors; and their directors, officers, agents or employees for any claim for damages arising out of or related to my voluntary participation in the travel course
8. I understand that the acceptance of this Assumption of Risk and Release/Waiver of Claims shall not constitute a waiver by WCU or UNC, in whole or in part, of sovereign or official immunity

9. I further agree to obey all laws and regulations of the country, countries and/or location(s) I visit. I agree to make a good faith effort to observe the customs and show respect and courtesy to the people of my destination site and everyone involved in the travel course
10. I further agree to reimburse the university for any and all expenses it incurs in reliance upon my promise to participate in the travel course
11. If I opt to travel independently before, during, or after the WCU travel course, I hereby voluntarily assume any and all risk with my independent travel and hereby release WCU and its trustees, officers, and employees from any and all liabilities that may arise out of or be related to my independent travel
12. I agree to abide by all relevant guidelines pertaining to appropriate behavior while preparing for and participating in the travel course including:
 - a. The WCU Code of Student Conduct
 - b. The course instructors' specific guidelines
 - c. Relevant laws within the host country
 - d. Policies and procedures of third-party providers and/or host institutions and
13. I have read and understand the Department of State warnings and advisories that may apply to my anticipated travel to a country/ies on that warning list (http://www.travel.state.gov/travel/cis_pa_tw/tw/tw_1764.html).

Further, I understand that the University specifically reserves the right to terminate my participation in the travel course without refund to me of any funds if I breach these guidelines or otherwise violate directives, rules, regulations or laws. I understand that I will be responsible for any and all fees associated with the termination of my participation, including any fees related to my return travel arrangements and/or lodging. Breach will be determined solely by the course instructor(s) without recourse by me to any of the procedures contained in the Code of Student Conduct.

I certify that I am at least 18 years of age and suffering under no legal disabilities and that I have carefully read and understand this Assumption of Risk and Release/Waiver of Claims, and agree to be bound by the terms contained herein.

Signature: _____
(Digital Signature Not Acceptable)

Printed Name: _____

Date: _____

Address/Phone: _____

If the participant is under the age of 18, the parent or legal guardian certifies that he/she has carefully read and understands this Assumption of Risk and Release/Waiver of Claims, and agrees to be bound by the terms contained herein.

Signature of Parent or Legal Guardian: _____
(Digital Signature Not Acceptable)

Printed Name of Parent or Legal Guardian: _____

Date: _____

Address/Phone: _____

Last updated 5/2011

ATTACHMENT 15
WCU ADMINISTRATION AND FINANCE POLICIES

Faculty members who are conducting travel courses should familiarize themselves with all relevant travel-related policies, in particular **Western Carolina's Travel Policies and Procedures** related to advances and reimbursements for expenses – see below – and the following website: http://www.wcu.edu/WebFiles/PDFs/TrvlMnl_revised_Jan_2011_with_revisions.pdf for complete manual.

*****SPECIAL NOTE: DUE TO END OF FISCAL YEAR ACCOUNT BALANCING, ALL TRAVEL ADVANCES MUST BE RECONCILED WITH THE TRAVEL OFFICE BY JUNE 15 OF THE ENDING YEAR; NO NEW ADVANCES CAN BE PROCESSED UNTIL APPROXIMATELY JULY 5 OF THE NEXT FISCAL YEAR.**

WESTERN CAROLINA UNIVERSITY
TRAVEL POLICIES AND PROCEDURES

Section 11 – Travel Advances and Reimbursements

Last Modified Date: 07/01/03

A. Travel Advances

1. Eligibility

Funds may be advanced to permanent employees for expenses to be incurred in approved travel on University business. Non-permanent employees may not receive travel advances. State Employees who have been issued state credit cards for travel purposes will not be issued travel advances, unless there is substantiated justification.

2. Procedures for Advance Requests

The request for funds must be submitted to the Controller's Office on a form titled "Request for Advance for Travel and Other Expenses Incurred in the Discharge of Official Duty" at least two weeks prior to the date of need to provide adequate time for check preparation. Advances must not exceed the estimated cost of the trip and may not be issued more than five (5) working days prior to the date of departure. Exceptions to the five (5) working day rule are as follows:

- Advances for payment of hotel room deposits will be issued earlier if required to insure conference lodging.
- Advances for airfare will be issued earlier in order to obtain "super saver" rates.

3. Clearing Advance

The traveler must clear the advance by submitting a completed "Travel Authorization and Reimbursement Form" within 30 days after the travel period. Advances must be deducted from the reimbursement request and a check for the net amount due (if any) will be issued to the traveler. In the rare event that the advance exceeds total expenses claimed, the traveler must attach to the reimbursement request a check for the excess, payable to the University. No subsequent advances can be made until the advance is cleared. All travel advances must be cleared prior to June 30th of each fiscal year.

4. Trip Delay or Cancellation

If a travel advance is obtained and the trip is not taken, the advance must be repaid immediately. If the trip is postponed, the advance must be repaid and a new advance obtained.

INTERNATIONAL TRAVEL APPROVAL FORM: Travel Abroad
Western Carolina University
(Revised, July 2012)

Use for travel abroad on *university business only* (attach additional pages if necessary)

Faculty/Staff information:

Name _____ Department _____
Last First MI

Please list all other WCU employees and individuals from other universities or organizations who will be traveling with the students:

| Name | Organization | Name | Organization |
|-------|--------------|-------|--------------|
| _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ |

Emergency contact information (Do not list spouse or other family members if they will be traveling with you):

Name _____ Relationship to you _____
Phone number(s):
Home (____) _____ Work (____) _____ Cell (____) _____

Travel information:

Destination(s): *(List all cities/countries to be visited, and attach a full itinerary)*

Individuals you will visit: *(List the names and contact information of all individuals with whom you will visit or work while abroad)*

Purpose of Travel: *(Conference, research, vacation, etc.)* _____

Date you will begin travel _____ Date of return _____

Did you use a travel agent? Y _____ N _____ *If yes, please complete the following:*

Name of Agency _____ Name of Agent _____

Phone number (____) _____

University Technical or Confidential Data:

Please list all university-owned confidential data to be taken on this trip (e.g., student or employee Social Security numbers, driver's license numbers, financial information or protected health information). Also list all university-owned technical data to be taken on this trip (e.g., any information required design or development; production, manufacture or assembly; operation; repair, testing or maintenance; modification of product in the form of blueprints, drawings, plans, photos, instructions or other documentation EXCEPT for information in the public domain)

ATTACHMENT 16
SUMMARY OF PROCEDURES FOR PLANNING AND EXECUTING FACULTY-LED TRAVEL COURSES

| Responsible Actor | Action |
|--|---|
| Instructor | Instructor expresses interest in leading a travel course and contacts IPS for information on how to plan and carry out the course. |
| IPS | IPS Assistant Director forwards to instructor a copy of Faculty Guidelines for Developing Travel Courses (available at http://www.wcu.edu/9515.asp). |
| Instructor | Instructor completes all necessary paperwork as discussed in the Guidelines and seeks/receives Department Chair's and Dean's approval for the course. Instructor then forwards documents to IPS Asst. Dir. for approval by September 15. Course paperwork received after October 15 will be held for processing until the next academic year. |
| IPS | IPS (Assistant Director) reviews course information including student and faculty budgets. If approved, documents are forwarded to Provost Office Designee for final approval. IPS notifies instructor when final approval for course has been granted. |
| Instructor and IPS | Once course is approved, instructor and IPS begin marketing the course to students at the Study Abroad Fair at the end of September and before Fall Advising Day. |
| Students | Visiting students from other universities must apply to WCU as a visiting student prior to registering for the travel course. |
| Instructor | For each student planning to enroll in the course, instructor collects student information forms (Attachments 12-14) and forwards to IPS. Instructors should also submit to IPS photocopies of students' passports if the course will be traveling overseas. |
| IPS | Once IPS receives signed FERPA releases from each student interested in the travel course, IPS contacts the Department of Student Community Ethics to review all students' ethics files and communicates the results to the instructor. |
| Instructor | Instructor determines if individual students will be barred from participating in the course due to their judicial records. |
| Students | Students pay \$500 deposit to OneStop office by February 15 (or by date indicated for trips taking place outside summer session travel period). |
| IPS | IF AN INSUFFICIENT NUMBER OF STUDENTS PAY COURSE DEPOSITS OR FAIL TO REGISTER FOR THE COURSE, IT MAY BE CANCELED BY IPS DUE TO LOW ENROLLMENT. |
| IPS | IPS enters course information in Banner. Course is entered as a Travel Course to avoid tuition charges for the students, with the exception of State Funded Travel Component Courses which do charge tuition. |
| IPS, Bursar's Office, and Financial Aid | Budget information and CRN for course is forwarded by IPS to the Bursar's Office and to the Financial Aid Office so that proper charges are posted to students' accounts when they register for the course, and that those eligible can apply for financial aid to cover the costs. |

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| IPS and Bursar's Office, and Registrar's Office | IPS consults with the Bursar's office to determine which students have paid travel course deposits (due no later than February 15, or date otherwise indicated). IPS will submit to the Registrar's Office AND TO PAULA COATES IN THE FINANCIAL AID OFFICE the names of all students who have paid required deposits so that they may be officially registered for the travel course. NO STUDENTS WILL BE REGISTERED FOR A TRAVEL COURSE UNLESS THEY HAVE PAID THE REQUIRED \$500 TRAVEL COURSE DEPOSIT (\$250 each for any additional travel courses). |
| Students | Students must pay any outstanding travel course fees no later than April 1, (or earlier date if indicated for trips that take place prior to summer session), unless receiving financial aid. Financial aid disbursements will be applied to travel course expenses 9 days before travel begins. |
| IPS and Bursar's Office Registrar's Office | IPS determines from the Bursar's office any students who have outstanding travel course balances. IPS contacts the Registrar's Office in order to drop students from the course enrollment who have not paid all associated travel course expenses by established payment deadlines (April 1, unless receiving financial aid, or earlier for travel courses taking place prior to summer session). |
| IPS | IPS orders trip cancellation and health insurance coverage for the instructor and all students participating in the travel course. |
| IPS, Instructor and Students | Students and instructor participate in Pre-Departure Orientation session coordinated by IPS in the spring prior to the class' departure. |
| IPS | IPS will communicate to Ann Green in the Provost's Office the amount of the instructor's stipend. |
| Instructor's Department | Instructor's departmental administrative assistant prepares Personnel Action Form to facilitate payment of instructor's stipend. |
| Instructor IPS | Instructor submits to IPS any invoices for travel course expenses that need to be paid prior to the class' departure |
| Instructor and Students | Travel course is conducted. |
| Students | Upon course completion, students submit a course evaluation to IPS. |
| Instructor and IPS | Instructor meets with IPS Asst Dir to evaluate travel course procedures. |
| IPS | Instructor's stipend is paid from IPS travel fund, unless otherwise indicated. IPS will also process other trip-related invoices as appropriate. |

ATTACHMENT 17

PARTICIPATING STUDENTS' CHECK LIST/TIMELINE

1. **Fill out and submit all required forms to your professor no later than November 15th:**
 - d. Student Application For Travel Courses (see Attachment 12);
 - e. Student Consent for Release of Information (see Attachment 13);
 - f. Assumption of Risk Release/Waiver of Claims (see Attachment 14).
2. Submit any additional requested forms to course instructor, third-party provider and/or host institution as required.
3. Pay all deposits and fees by specified due dates:
 - c. **Travel course deposit of \$500: due by February 15th (or date otherwise indicated for travel taking place outside summer session timeframe)**
 - d. **Final course payment: due by April 1st**, or earlier for travel courses taking place prior to summer session (unless on Financial Aid). If you are on financial aid, consult with the Financial Aid office about procedures that must be completed and forms that must be submitted in order to obtain financial assistance in covering the cost of the trip. ***All participants should be aware that student loans are the only form of financial aid available to cover the cost of travel courses during the summer.***
4. If you are participating in a group tour sponsored by an educational tour company, you must order travel insurance through your tour company. This should be done no less than one month prior to your departure date or it will be ordered on your behalf through HTH Worldwide Insurance and be billed to your student account.
5. Obtain all necessary vaccines. Be aware that some vaccines require multiple doses over a period of weeks or months.
6. Attend ALL pre-departure orientations scheduled by the faculty member and IPS.
7. Abide by all relevant guidelines pertaining to appropriate behavior while preparing for and participating in the travel course:
 - a. The WCU Code of Student Conduct
 - b. The course instructor's specific guidelines
 - c. Relevant laws within the host country
 - b. Policies and procedures of third-party providers and/or host institutions;
8. Submit a course evaluation at the conclusion of the program;
9. If there is a transcript from the host institution, submit it to IPS with the course evaluation sheet in order to receive credit for the course;
10. Have fun and learn a lot!

ATTACHMENT 18

FACULTY MEMBER'S CHECK LIST/TIMELINE

1. Identify in-country resources such as accommodations, ground transportation, and sites/agencies/universities to visit.
2. Identify a reliable third-party provider if appropriate. Work with IPS on vetting such providers. If working with a third party provider, copies of all relevant contract information should be provided to IPS along with course approval forms.
3. **Determine the current costs, if any, for travelers to obtain guest visas for entering your country destination by consulting that nation's embassy website.
4. **Determine which vaccines are required and/or recommended by the Centers for Disease Control and Prevention for individuals traveling to your specific destination by consulting the CDC's website at:
<http://wwwnc.cdc.gov/travel/destinations/list.aspx>.
5. Develop budgets—see attached budget templates. **Be sure to include the costs of any visas and necessary vaccinations in the student and faculty budgets. Estimates relating to the costs of vaccinations can be obtained by contacting local area health departments such as the Macon County International Travel Clinic at (828) 349-2081 or the Buncombe County Travel Clinic at 828-250-5096.
6. Submit all required attachments to department head, dean, and then upon their approval, to IPS by **September 15**.
7. Once course is approved by IPS and the Provost Office's Designee, advertise the travel course. IPS will assist with this task.
8. Collect student information sheets and select student participants. Develop selection criteria and processes based on interpersonal, teamwork, and academic skills necessary to complete course objectives while traveling. Forward student paperwork, including copies of student passport photo pages if traveling overseas, to IPS by **November 15**. MAKE EITHER PAPER OR DIGITAL COPIES OF THESE FORMS TO TAKE WITH YOU ON THE TRIP.
9. Make sure that an adequate number of students have submitted student paperwork and passports. IPS will confirm with the Bursar's office whether or not students have paid the required \$500 course deposit prior to them being registered for the course.
10. Distribute Attachment 17 to students
11. Make sure students pay associated fees to OneStop (**deposits by February 15** and **final course costs by April 1**, unless students are receiving financial aid or dates otherwise indicated for travel outside of the summer travel period). Alert students to the fact that any outstanding fees will be encumbered with trip deposits so they must pay parking, library fees, etc. before making trip deposits.
11. In conjunction with IPS, plan pre-departure orientation for students in **mid-April**.

**FACULTY-LED TRAVEL COURSE CHECK LIST
FOR IPS USE ONLY**

| <u>Date</u> | <u>Task</u> |
|-------------|--|
| _____ | Summer/early fall semester faculty workshop attended |
| _____ | Initial contact with course instructor. Faculty Guidelines forwarded to instructor by IPS. |
| _____ | Faculty begins working with transportation/accommodations/meal providers to obtain costs and prepare budgets |
| _____ | By September 15, complete travel course documents submitted by instructor with DH and Dean's approvals to IPS. |
| _____ | September 16-20, IPS review/approval of course information and budgets. |
| _____ | Course documents forwarded to Provost Office Designee for final approval. |
| _____ | Instructor informed of final course approval. Marketing of course by instructor and IPS initiated. |
| _____ | Late September, faculty member works with IPS in designing/submits promotional brochures for course to IPS and faculty member participates in annual Study Abroad Fair to market course |
| _____ | Receipt by IPS of student information forms submitted by instructor |
| _____ | IPS review of student judicial records; results communicated to course instructor. |
| _____ | Confirmation of course creation in Banner by IPS |
| _____ | CRN and budget information for course forwarded to Financial Aid and Bursar's offices |
| _____ | IPS review to ensure sufficient enrollment for course to make. Course canceled by IPS if necessary. Students registered by Registrar's office after paying course deposit; registration list forwarded to Paula Coates in Financial Aid. |
| _____ | IPS review of student accounts to ensure proper payment of all trip-related charges; IPS-initiated drop of students from course who have outstanding balances |
| _____ | Visual Compliance completed by IPS; Export Control and Temporary Export License Exemption form forwarded to Andrea Moshier |
| _____ | Pre-departure orientation session conducted by IPS |
| _____ | Trip cancellation and health insurance ordered for instructor and students by IPS |
| _____ | Faculty member registers travel plans with the State Department through free online service at http://travel.state.gov/travel/tips/registration/registration_4789.html |
| _____ | Dept. admin assistant prepares PAF and IPS communicates to dept. admin assistant the approved stipend amount for instructor |
| _____ | IPS receipt of travel course evaluations by students |
| _____ | IPS debriefing with course instructor |
| _____ | All travel-related costs, including instructor's stipend, invoiced and paid through IPS travel course account. Some of these may be paid in advance to providers; others will be paid after the trip by travel reimbursement. |