

UNIVERSITY OF WASHINGTON

# Departmental Planning Guide for International Programs

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Edition IV

Also available at <http://ipe.washington.edu/depts/dpg.html>

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# SECTION 1: DEPARTMENTAL PLANNING GUIDE OVERVIEW

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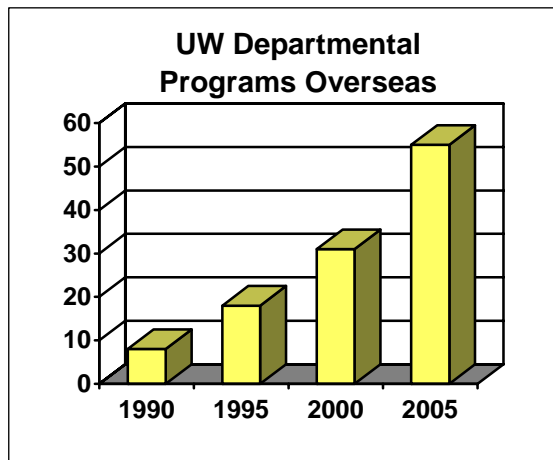
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## Section 1: Departmental Planning Guide Overview

### INTRODUCTION

Over the course of the past decade, there has been tremendous growth in departmental overseas study programs. In 1990 there were just three such programs in a limited region. By the turn of the millennium, this number had increased tenfold. Now, more than fifty UW faculty-led programs operate around the globe on an annual basis, bringing students, faculty and staff to a range of continents, cultures and host countries and increasingly enriching the scope of the University of Washington. Over the years, thousands of UW students have participated in departmental programs, and most look back at their international experiences as the most rewarding and meaningful of their college careers.

The University of Washington International Programs & Exchanges Office (IPE) aims to increase global awareness and understanding of UW students and faculty through support of these international study opportunities. It endeavors to facilitate programs and exchanges that are easily accessible to UW students and that can be readily integrated into their programs of study. The willingness of individual departments to create and manage international study programs is central to the success of this effort.



### PLANNING GUIDE GOAL

The purpose of this Departmental Planning Guide is to provide a comprehensive source of information for departments on the elements that go into planning, executing and assessing an international study program. Following these steps will enable departments to run successful programs abroad, and it will also help IPE foster a more uniform organization among UW departmental programs. This guide and its appendices can be found online at [ipe.washington.edu](http://ipe.washington.edu).

This Departmental Planning Guide is designed to

- provide information and support to the academic units running departmental programs,
- clarify the roles and responsibilities of the various players,
- provide samples of the documents involved in the process, both for the student and faculty member, and
- minimize (as the French say) the "reinvention of the bicycle" phenomenon.

The IPE wishes to stress, however, that these are guidelines, not a blueprint. Individual departments can and should put their own stamps on their international programs.

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### DEPARTMENTAL RESPONSIBILITIES

#### **Recruiting Program Director**

The program director is the UW faculty member with primary responsibility for the program. This person is key to the success of a program. As program director, a faculty member will organize and implement the majority of the program's elements and will interact the most with the program's participants. With this in mind, the department should seek a program director with particular expertise in the host country and its language and with a strong track record in teaching undergraduates.

Departments should also alert prospective program directors of this position's responsibilities (perhaps through demonstration of this guide) prior to either side making a commitment.

#### **Identifying Appropriate Site for Departmental Program**

Many factors must be taken into account by the department in its selection of a program's location. Among things considered ought to be

- the adequacy of local facilities,
- the ability of the site to complement the courses proposed,
- the familiarity of the program director with the site and the local language,
- the strength of his/her contact with local academics or practitioners,
- the political stability of the region,
- the rate of crime,
- the accessibility of health care, and
- the degree of the area's vulnerability to natural disasters.

#### **Determining Departmental Program Contact**

The departmental program contact is the department's faculty or staff member who is responsible for becoming the program director's main home contact. This person will aid the program director with any difficulties that he or she has during any step of program implementation, maintain contact with the program director while he or she is in the host country and assist the program director with the submission of student grades after the program is over. The departmental program contact's role is essentially designed to ensure that there is a designated person who maintains a link to the program throughout all of its stages – before, during and after. The department should determine who this person is in the early stages of planning its program.

#### **Providing Departmental Support for Program Directors**

Administering a study abroad program is a time-consuming and challenging job; therefore, the program director will benefit from the help and support of the department, in both financial and practical terms. Departments should be willing to create or solicit on or off-campus funding for their international programs and should be included in program budget discussions. They should provide insight into the development of a program focus and program administration issues; strive to create courses that can be offered abroad; provide clerical support; and help promote their international programs through advocacy, advising, class contact with students, etc. The success of a department's study abroad programs is often a reflection on the department itself, so administrators will want to take an active interest in their programs.

#### **Identifying Funding for Program**

Funding is, of course, very important in the implementation of a program. Much of a program's funding comes from the participants' program payments. For example, the UW Financial Aid Office estimates that a traditional UW undergraduate student who lives on-campus spends approximately \$4000 per quarter. A departmental program that charges a similar amount to twenty students will have \$80,000 to run its program overseas. Outside funding is also very useful in making a program both better and more affordable. Departments can play a major role in the creation of funding for the program by contacting alumni, local foundations or businesses.

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The chief form of departmental financial support for the program comes from the faculty member staying on salary while teaching overseas. Beyond this, departments may wish to utilize funds in discretionary budgets to enhance the experiences of the program participants.

As programs continue for several years and develop a pool of alumni, these past participants can become wonderful sources of scholarship support. Contact IPE for more information.

### **Including Study Abroad Link on Departmental Homepage**

It is important that promotional and pertinent information on departmental programs can be easily found and accessed via the internet. Departments should provide the support necessary to allow program directors to create a program webpage and should, if at all possible, make sure that it is readily accessible from the departmental website homepage. Please see *Appendix E* for examples of a departmental website's study abroad link and of a program webpage.

## **PROGRAM DIRECTOR RESPONSIBILITIES**

The program director has much to do in the months before the program begins, as there are many elements that go into creating a successful foreign study program. Below is a description of the key activities in which the program director will be involved before the program begins. Program directors who are taking programs to the UW Rome Center should also see the Rome Center guide in *Appendix A* for additional assistance in the program planning process.

### **Completing Program Planning Checklist**

It is advisable for program directors to begin the departmental program planning process at least 12 months in advance of the beginning of their programs. Program directors should review the program planning checklist included in *Appendix B* of this guide in the initial stages of program planning and should use this checklist to map out all of the tasks that need to be completed to create a successful program. The checklist, like this guide, details tasks to be completed before, during and after the program – from the development of the program idea to the printing of the program brochures to the orienting of students in the host country to the final submission of grades and accounting. All program directors should pay special attention to this checklist and should make a concerted effort to check off all of the tasks that it outlines.

### **Developing Program Focus / Gauging Student Interest**

The development of the program focus is a major part of the planning process. Its genesis will define the tenor and theme of the program and will identify the type of students who will want to participate. The program director should define the academic focus of the program, the types of courses to be taught, and the necessary linguistic or other academic backgrounds that students must have in order to take part in the program, all the while attempting to judge whether there will be students with an interest in such a program. It is necessary from the beginning to gauge the level of student interest: will this be a program that will attract department majors and/or students outside the department, outside the UW? The program director may wish to work with the advisor in the department to survey the department's majors. A questionnaire that inquires about issues such as program location, timing and cost can indicate the level of student interest in a particular type of program. Thus, it can help to ensure that students will actually sign up.

It is also important to ascertain how interested other faculty members of the department are in providing support for the program, both in recruiting students and in becoming future program directors.

### **Identifying Resources**

The program director should ascertain if there are sources of funding for the program beyond the payments from students. For example, will the program director stay on salary during his or her term overseas? (This is the norm for UW departmental programs, but this support should be verified.) Will the department provide seed money for the program, clerical support, etc.? Are there any sources for faculty travel or for student scholarship from alumni, foundations, the Provost's Office, the Dean's Office or the department?

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### **Making Contacts Abroad**

A local coordinator is another of the keys to a successful program; thus, it is important to establish contact with the right people in the host country. Are there certain local university officials, faculty members, facilities operators, travel agents, etc., whom the program director can contact to provide the logistical expertise necessary to run the program? The program director and the department should bear in mind that these local experts are NOT expected to be volunteers! Instead, the program budget should include a specific fee (perhaps a per student fee) for their services.

### **Creating a Program Budget**

The program director will want to work with the IPE to create a budget for the program that sets the program price at a sort of happy medium: one that includes the important desired components but refrains from pricing students out of participation. He or she will also want determine how many students need to enroll to fund the program. For example, if the overall program costs total \$80,000 and a reasonable program price for students is \$4,000, the program will need to enroll 20 students to break even.

As mentioned above, the program director should also keep in mind that the Financial Aid Office estimates that a "traditional student" (a resident undergraduate) spends approximately \$4000/quarter to study at the UW. If the program price plus airfare matches this, it will be easier to recruit for the program.

The budget should include:

- UW faculty and teaching assistant support (salary) if the department does not provide this support,
- faculty housing on-site,
- faculty airfare,
- Faculty per diem (usually between \$17 - \$35 per day, depending upon cost of living in host country)
- instructional costs on-site (guest lectures, supplies, books, etc.),
- student housing and board (full or partial),
- excursions/entrance fees to program activities,
- site administration/local coordinator fee,
- program reserve (5-10% of total program expenditures to cover currency fluctuations and emergencies and to leave a small balance in the budget for future programs),
- on-campus administrative costs (brochures, advertising, long distance phone calls, etc.) unless the department is covering these expenses.

A typical program budget does not include:

- student travel to and from the program site,
- student spending money,
- student insurance,
- IPE fee.

As you create your program budget, be sure to do so in keeping with the UW policies on transportation and alcohol for international programs. Reference *Appendices Q* and *W* for full policy descriptions.

Please use the sample program budget in *Appendix C* to begin building your budget.

Upon completion of the first draft of the budget (and before creating the program brochure, publishing the program price to students, etc.), the program director should meet with the departmental program coordinator, Melissa Williamson ([melissaw@u.washington.edu](mailto:melissaw@u.washington.edu)) at IPE.

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### Determining Program Fee

Program directors will work with Melissa at IPE to establish a program budget, and from this budget, they will determine the fee that students will pay for the program. Once the departmental program fee has been established (and approved by IPE), program directors will include the program fee and payment schedule in the program brochure and on the program webpage.

### Creating Payment Schedule

IPE administers finances for most departmental programs by charging students' UW tuition accounts for program payments and by managing program funds for program directors. When administering finances, IPE charges program fees to students in three installments: \$350 non-refundable deposit, \$500 program payment and program fee balance (fee - \$850). Students, in turn, make program payments to UW Student Fiscal Services via their MyUW personal pages or in 129 Schmitz Hall.

An example of a typical program payment schedule appears below. Program directors will work with Melissa at IPE to determine the program payment schedule that is right for their program and will, again, include this in the program brochure and on the program webpage.

#### Winter 2007 Program Payment Schedule

| Payment Type                   | Payment Amount | Payment Due Date |
|--------------------------------|----------------|------------------|
| Non-refundable Program Deposit | \$350          | Oct. 20, 2006    |
| Program Fee Payment            | \$500          | Nov. 3, 2006     |
| Program Fee Balance            | Fee - \$850    | January 19, 2007 |

### Establishing Program Withdrawal Policy

Programs administered by IPE should include the following withdrawal policy in all program and payment materials (brochures, webpages, payment contracts – all described in further detail below).

Any student withdrawing from the program by Insert withdrawal deadline here will not be responsible for any payments beyond the non-refundable \$350 deposit. Any student withdrawing from the program after this deadline will be liable for any non-recoverable payments already made or committed on behalf of the participant, which may range from the non-refundable deposit up to the entire program fee. No refunds will be made after the program begins.

In addition to working with IPE determine the program payment schedule, the program director will also collaborate with IPE to establish a withdrawal deadline for the program. This deadline is usually about 60 days before the start date of the program. For more information, program directors will want to contact Melissa ([melissaw@u.washington.edu](mailto:melissaw@u.washington.edu)) at IPE.

### Determining Program Application Procedure

The Program Director should develop a program application and in the process, determine what format to use, what kinds of applicant information to require and what deadlines to set. Generally, the IPE requires a statement of purpose, one or two letters of recommendation and a UW transcript in addition to its application forms. Program directors may want to require the same for their departmental programs.

Program applications should be submitted to the department approximately five months prior to the start of the program. This ensures that there is both the information and the time to select and orient highly qualified candidates. Program applications should then be made available to students via the departmental advising office and via the program website (both of which are described in more detail below). Please see *Appendix F* for a sample program application.

### Designing Program Brochure and Webpage

The program director will want to design program recruiting materials (brochure and webpage) that inform students, parents and the rest of the UW community of all of the pertinent details regarding the program. The program brochure and webpage will

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serve as the program's publicity medium, course catalog and information and policy source. Consequently, these information sources should detail as much as possible about the program: program focus, courses, credits, faculty, dates, location, payment schedule, application process, deadlines, withdrawal policy, contact names and addresses of the program director/contacts. As the brochure and website designer, the program director should remember that the brochure is often what students take home to show parents (i.e. potential funding sources)!

Before printing or posting the program brochure or webpage, the program director should send the departmental program coordinator at IPE drafts of these documents. Melissa will review them to ensure that all information is accurate and up-to-date and will then approve them for distribution to students.

Once the program brochure and webpage have been approved by IPE, the program brochure should be distributed to students via departmental advising offices, the IPE reference library, class visits and informational meetings. The program webpage, as well, should be sent to students via adviser list serves and should be made easily found on the departmental homepage. In fact, program directors will want to request that their department include a very visible link to the program webpage directly on the departmental homepage.

*Appendix D* includes an excellent example of how to include a great deal of information in only a single page brochure. *Appendix E* provides a sample of an effective departmental program webpage and a sample of a link to this webpage from the departmental homepage

### **Recruiting Students**

Recruiting students is, of course, imperative to the life of a program. In fact, it may be the most important component of the program director's pre-departure activities. The program director will want to begin recruiting students at least eight months prior to program departure and will need to develop a program brochure and program application, as outlined above. If the program has room for twenty-five students, the program director should keep recruiting until there are forty or so applicants. This will provide a larger pool of applicants during the selection process, which will allow for the selection of higher quality participants as well as for the development of a waiting list. It is never easy to have to reject students, but it is decidedly worse to have too few students to choose from and, as a result, to accept a student who would best be left in Seattle!

Catchy program titles, interesting program descriptions, and program themes that are of specific interest to students and/or that apply directly to their degree programs are all factors that help to motivate students to apply for and participate in departmental programs. When creating the program focus and when writing program materials, program directors will want to be conscious of the marketing factor. Program directors should take a moment to identify the target student population for the program and should make sure that the programs they are creating and the program information they are generating will attract participation from these students.

In the past, the following have proven to be successful recruiting strategies:

- making 5-minute visits to UW classes that could contain potential participants;
- sending direct emails to students who have taken natural "feeder" courses for the program (given time, IPE can often arrange for this);
- providing program information to the advisors in relevant departments;
- announcing the program at a departmental faculty meeting; and
- promoting the program at the UW study abroad fair (held during the month of October, contact IPE to sign up).

### **Selecting Students**

Students apply to go overseas for a wide range of reasons, including but not limited to:

- faculty encouragement,
- fascination with the host country,
- family encouragement,
- academic burn-out,

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- romantic disappointment (the French Foreign Legion syndrome!),
- adventure,
- interest in the subject matter,
- peer encouragement,
- disappointment in the quest for academic direction (looking for a period "off the wheel" that will help them to decide on a major).

With these very different motivations in mind, the program director will want to determine what sort of selection process to use. Will it be first-come, first-served? Will all majors automatically be accepted if they meet the prerequisites? Will the students be interviewed as part of the selection process? Will the program be open to non-UW students? Generally speaking, programs that are more selective and that interview their applicants turn out to be more successful.

In selecting the program participants, the program director should consider all information provided as part of the application and should then select students based upon the vision for the program and upon the number of spots available. The program director should bear in mind that the students who are selected will become representatives of the department, of the UW, and of the United States.

### **Accepting Students**

All applicants, selected or rejected, must be notified of the decision in writing. When accepting students, program directors should bear in mind that a waiting list of five or more students usually serves programs very well. It is important to keep at least a few willing participants in reserve in the event that another member of the program decides to withdraw. If, in the end, the students on the waiting list do not move up to the participants list, they can be given priority for selection the following year.

When accepting students, program directors may want to give students a combination of the following:

- 1) program acceptance letter,
- 2) program payment contract,
- 3) IPE pre-departure checklist,
- 4) notice of any upcoming program meetings,
- 5) any other program-specific forms, information, etc. that will help them in their preparation for departure.

Together, these pieces of information will give students a clear sense of their responsibilities regarding program preparation and participation, immediately upon their acceptance to the program. Please see *Appendices G* and *S* for samples of all of these documents.

### **Confirming Student Participation / Collecting Student Payment Contracts**

In order to formally confirm student participation, program directors will need to collect signed payment contracts from all program participants shortly after their acceptance to the program.

The student payment contract is a document that outlines the terms and conditions of participation in UW departmental programs (including program cost, payment schedule and withdrawal policy) for accepted program participants. Melissa at IPE will prepare this document for program directors who will then send it to students along with the initial acceptance information to the program. Students wishing to participate in the program will, in turn, be required to sign and submit this contract to the program director.

Please see *Appendix G* for an example of an effective (and combined) student acceptance letter and payment contract. Program directors will want to contact Melissa ([melissaw@u.washington.edu](mailto:melissaw@u.washington.edu)) to request that a contract be created for upcoming departmental programs.

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### **Submitting Student Roster and Payment Contracts to IPE**

In order to initiate the charging of the non-refundable deposit and subsequent program payments to program participants' UW tuition accounts, the program director will send signed contracts for all program participants *and* a program roster, which includes the full name, UW student number and email address of program participants, to IPE.

As soon as IPE receives both the signed student payment contracts and the program roster, the IPE fiscal team will begin to charge student accounts according to the program payment schedule.

Please see *Appendix R* for a sample program roster and *Appendix G* for the student acceptance letter and payment contract.

### **Recruiting / Accepting Non-UW Students**

Program directors wishing to accept non-UW students for participation in UW departmental programs are welcome to do so, though as a general rule, UW students should be given first priority. Upon acceptance to the program, non-UW students will need to submit the non-matriculated application for non-UW students to IPE (found in *Appendix T*). Non-UW students will then be given a UW student number, a UW Net ID and access to the MyUW personal page, UW email, etc. Their program payments will subsequently be charged to their UW tuition accounts and will be payable to UW Student Fiscal Services. The fee for this is a non-refundable \$200, which will be assessed to students' new UW accounts upon receipt of the form.

### **Handling Student Withdrawals or Late Additions**

Students wishing to withdraw from a program *after* signing and submitting their student payment contracts will need to submit a withdrawal form to IPE. In addition, they will be asked to send written notification of their decision to withdraw from the program to the program director. Students withdrawing from UW departmental programs administered by IPE will be subject to the program withdrawal policy. Please see *Appendix U* for the withdrawal form.

Program directors should make it a point to communicate any changes or additions in the program roster to IPE immediately by sending additional signed payment contracts and an updated roster to the fiscal team.

### **Making Arrangements Abroad**

**Classroom Facilities:** Some programs rely more heavily on classroom facilities than others, but in most cases having a "home base" for the program is important. The local coordinator should be able to advise the program director on the location (relative to points of interest, bus or subway lines, student housing, etc.), cost and suitability of possible classrooms. The program director will make the arrangements necessary to secure the academic facilities.

**Faculty and Student Housing:** The program director should identify, contract for and probably pay a deposit for both student and faculty housing two to three months before the program begins. If at all possible, it is advisable for program directors to refrain from paying the entire fee for student housing until well into the quarter abroad. This will reserve some bargaining power with landlords in the event that any housing discrepancies or inadequacies occur.

Living accommodations will, of course, vary from place to place, depending on the study program and the country. Both availability of housing and local regulations differ widely; therefore, it is the responsibility of the program director to determine what sort of housing the program will offer (host families, apartments, dorms, hotels) and to secure this housing before the program starts. Students are usually expected to accept the type of housing arrangements the program offers, though departments may need to make special accommodation for students with particular needs or accompanying family members.

Because suitable housing is important for the comfort and welfare of all participants, including successive generations of UW students, the program director should endeavor to find housing that creates a good experience for all participants. Unsuitable housing should be identified and avoided when possible, and householders who adopt discriminatory practices based on race, ethnicity, gender, sexual preference, etc., will not be considered suitable landlords for future UW programs.

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Students are usually expected to live with other students in dorms or apartments or with families as paying guests. In all cases, it is important to include a list of several ideas on the standards and expectations of one's "living skills" in the student conduct contract (see *Appendix H* for details).

### **Making Payments for Program Expenses**

The IPE manages the funds for most of the UW's departmental programs. Program directors will work with the IPE to determine the best method of payment for program expenses. Payments can be made via:

**Wire Transfer:** For some services (especially, but not always, for housing, classroom space or excursion expenses), program directors can arrange for vendors to send an invoice to the fiscal team at IPE. The IPE fiscal team will then request that the UW's General Accounting Office wire this amount to the vendor's bank. This process (from the receipt of the invoice until the payment reaches the vendor) usually takes between 3 - 6 weeks from the time requested. Program directors who wish to make payments via wire transfer should send the following information to IPE well in advance of the payment due date:

Vendor Name  
Bank Name  
Name on Account  
Bank Address  
Bank Account Number  
Bank Codes  
Swift Code  
IBAN  
Currency in which payment is to be made

The program director should be advised that the UW charges a \$25 transaction fee, which will be posted directly to the program's budget. In addition, wire transfer generally goes through multiple banks on its way to its final destination, and each institution can (and often does) charge a fee. Due to both the exchange rate and the multiple transfers, the amount the vendor receives will often be less than the amount requested and sent by the UW. In the event that this occurs, the program must reimburse the vendor for any difference between the requested payment amount and the amount received. Program directors will want to allow for these additional expenses in the program budget.

**CTA card:** It may be possible to pay for some larger program expenses (fieldtrip travel, lodging and especially instructor airfare) via the IPE's CTA (Central Travel Authority) credit card. IPE recommends that program directors use the CTA card to purchase instructor airfare for the program. To request payment for airfare using the CTA credit card, please complete the two easy steps below:

1. Reserve flight itinerary from a State Contract Travel Agency. Please visit <http://www.washington.edu/admin/travel/> for a current list of approved agencies.
2. Contact IPE at 206-221-4404 to have an IPE fiscal representative purchase the flight.

Please note: Program directors and instructors can also purchase airfare on their own and then request reimbursement from IPE. When doing so, faculty should still either purchase airfare from a State Contract Travel Agency or purchase a non-contract airfare according to UW Travel's list of acceptable reasons, located at <http://www.washington.edu/admin/travel/air.travel.html>. Program directors who do choose to purchase their own airfare should bear in mind that reimbursement for airfare expenses can take up to two months to arrive. To request reimbursement for airfare purchases, program directors should submit their receipts and itineraries to the IPE fiscal team.

**Advance Purchase in Seattle:** Faculty who wish to purchase books for the program from the University Bookstore should first contact the bookstore in plenty of time to order the books and then forward the order information to a fiscal

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representative at IPE for payment. If it is necessary to purchase books and/or supplies from another store, please contact the IPE before ordering to discuss payment options.

**Field Advance:** The field advance is an amount entrusted to the program director for program purchases on site. In most cases, it is advisable to minimize the amount of the field advance by arranging for wire transfers (when possible) before the program begins. Program directors should, however, plan on covering some expenses via a field advance, as some landlords require housing payment in cash, some expenses cannot be wired to foreign vendors in advance, etc.

Field advance funds can either be brought to the host country in the form of traveler's checks (necessary when bringing large amounts to cover student housing) or can be deposited in a U.S. bank account and withdrawn in small amounts (\$250 - \$500 per day) from ATM machines. Program directors cannot, however, deposit field advance funds into a foreign bank account. This has the potential to bring about problems with the U.S. Department of Homeland Security.

IPE will work with the program director to determine what portion of the program funds can be spent before the program (through the methods described above) and what portion should be given to the program director as a field advance. IPE will then assist the program director in obtaining and accounting for the field advance. For more information on payment of program expenses, program directors should contact the Melissa at IPE.

Field advance forms and more information about field advances can be found in *Appendix K*.

### **Considering Currency Fluctuation**

The program director should determine if payments on-site will be made in foreign currency or dollars. If a substantial portion of the payments will be made in local currency, the program director will want to add an asterisk to the program price in the brochure that will allow for the price to rise (or fall) should exchange rates change beyond what can be covered out of the program reserve. Please see the sample program brochure for the most current recommended language.

### **Orienting Students Before Departure**

**Program Orientation Meeting(s):** Prior to departure, the program director will want to meet with the students several times. The first such meeting should include a general program overview and an introduction to the program director and his or her vision for the program. The program director should share with the group accounts and stories that give an idea of his or her own experiences in the host country. Other meetings can then give the students the opportunity to get to know each other and to begin to develop both *esprit de corps* along with a student conduct contract (See *Appendix H* for a sample). It is often a good idea to do this in a non-classroom setting, as it will be important for these students to get along in a non-academic environment as well as in an academic one. For example, past program directors have reported great results from inviting the students into their homes for one of the pre-departure meetings.

The program director should also be sure to discuss program-specific nuts and bolts issues like housing, travel, packing, host country arrival/meeting point, etc., as well as to provide an orientation to the program, country and culture. He or she should be sure to clearly address insurance requirements and visa issues in one of these early meetings. If it seems that many of the program's participants will be using financial aid to finance their travels, the program director will also want to invite an IPE fiscal specialist to one of the initial program meetings to talk about financial aid options, revision requests, etc.

Successful orientations strive to produce realistic expectations in the students. This is often difficult, as students have their own conceptions of what Rome or Cuernavaca or Tokyo will be like. Inviting past student participants or faculty colleagues as speakers with slides of the site, the classrooms and the home-stay environments (if applicable) can often be effective in getting the right message across. The program director will want to make sure that students understand the academic, personal and cross-cultural adventure upon which they are about to embark.

**Mandatory Study Abroad Orientation:** UW policy requires that all students participating on study abroad programs attend a general study abroad orientation before heading off on their programs and exchanges. Held on a quarterly basis, these orientation meetings are facilitated by representatives from the Foundation for International Understanding Through Students

## **Section 2: Before the Program**

(FIUTS) and IPE. They are designed to be thorough break-downs of the administrative details and practicalities of the study abroad experience. Students attending these meetings will receive their concurrent enrollment and health screening forms, their study abroad packets and a host of information regarding registration and concurrent enrollment, health and safety, culture shock/reverse culture shock, financial aid and credit conversion. The meetings are mandatory and must be attended by all program participants.

The general orientation meetings are essential to ensuring that the UW sends well-informed, well-prepared students abroad. Likewise, they are crucial to eliminating the glitches that come about when students leave U.S. borders, uninformed of UW policies and procedures. Program directors will need to take special care in stressing to students the mandatory nature of the orientation meeting. They will also want to submit a roster of program participants to the manager of educational outreach at FIUTS ([outbound@fiuts.org](mailto:outbound@fiuts.org)), best if submitted in an electronic Excel format.

Information regarding orientation dates, schedules and particulars can be found on the FIUTS website at <http://www.fiuts.org>. Students who cannot attend orientation will need to make arrangements with the manager of educational outreach at FIUTS to attend a make-up orientation. Program groups who are unable to attend will need to submit a written explanation for their absences to both the manager of educational outreach at FIUTS ([outbound@fiuts.org](mailto:outbound@fiuts.org)) and the departmental program coordinator at IPE ([melissaw@u.washington.edu](mailto:melissaw@u.washington.edu)).

### **Establishing Student Conduct Contract**

The students selected to participate on the departmental program will be embarking on a transnational, cross-cultural journey together as representatives of the United States of America, students of the University of Washington and members of the program group. During the initial program meetings, it will be important for the program director to facilitate the development of a student conduct contract. This contract should grow out of several group discussions and should be a written document that outlines the expectations of group members and the program director in terms of each individual's comportment during the program. This student conduct contract should remain open to addition, deletion and modification as the program progresses.

Each program participant should be required to sign a copy of the contract and return it to the program director. Over the course of the program, the student conduct contract can be used to help group members reevaluate the evolution of the program. It can also become an important document if a disciplinary issue arises with one of the program participants. Please see *Appendix H* for a sample student conduct contract.

## **IPE RESPONSIBILITIES**

### **Providing Program Planning Support to Program Directors**

In addition to producing this guide, the IPE provides support to program directors in developing initial departmental program ideas; developing the program budget; creating the program brochure, webpage, payment schedule, payment contract, withdrawal policy; managing program funds; determining payment methods; answering student queries; orienting students and more. Program directors with questions or queries are encouraged to contact the departmental program coordinator, Melissa Williamson ([melissaw@u.washington.edu](mailto:melissaw@u.washington.edu)), for information, guidance and assistance.

### **Approving Program Budgets, Brochures and Webpages**

The departmental program coordinator at IPE is ready and willing to provide information and advice to program directors on the creation of program budgets, brochures and webpages. Once program directors have created drafts of the program budget, brochure and webpage, Melissa will vet these documents, make suggestions for improvement and subsequently (after appropriate changes have been made) approve them for use in the planning, recruiting and implementation of the upcoming departmental program. Program directors should be sure to run the program budget, brochure and webpage by Melissa ([melissaw@u.washington.edu](mailto:melissaw@u.washington.edu)) at IPE in the early stages of program planning. This helps to ensure that all of the right pieces appear in these documents before they are sent out into the world.

### **Promoting Program**

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The IPE aids in the promotion of international programs and exchanges on the UW campus through its reference library, its advisors, its website and its publications. It is a central place where students can come to find out general information on a wide variety of programs; consequently, it is a valuable resource to departmental programs. The IPE will include information regarding departmental program offerings and links to departmental program webpages on the IPE website and regional outlines and will distribute program brochures and/or applications (if furnished with these forms by the program director) to interested students. It will also direct students to the program director and/or departmental program contact for more specific information.

### **Preparing Program Payment Contracts**

For most programs, the IPE is responsible for charging program payments to student accounts. When administering finances, IPE charges program fees to students in three installments: \$350 non-refundable deposit, \$500 program payment and program fee balance (fee - \$850). Students, in turn, make program payments to UW Student Fiscal Services via their MyUW personal pages or in 129 Schmitz Hall.

Program directors will work with Melissa at IPE to determine a program payment schedule that is right for their program and will include this in the program brochure and on the program webpage. Once the program payment schedule has been determined (and upon the request of the program director), Melissa will prepare a payment contract for the program and will send it electronically to the program directors. The program director will then want to send this to students along with their program acceptance information. Students will be considered confirmed program participants once they have signed and returned this contract to the program director.

### **Charging Student Accounts for Program / Enrollment Fees**

Upon receipt of signed student payment contracts and a program roster from the program director, the IPE will charge program payments according to the previously established program payment schedule (to be outlined in the program brochure, on the program webpage and in the program contract).

Once the IPE has charged their accounts, students are able to track their program payments and payment due dates on the Tuition Account Balances section of their MyUW personal homepages. They then make payments directly to the Student Fiscal Services Office (via their MyUW webpages or in 129 Schmitz Hall) by the appropriate deadlines.

In addition to charging students for the departmental program fee, IPE will charge an additional IPE fee of \$200/quarter, \$300/semester or \$600/academic year to students who are concurrently enrolling for study abroad. This fee provides for students' concurrent enrollment, pre-departure orientation, etc. For more information, please contact Melissa or reference Concurrent Enrollment at <http://ipe.washington.edu>.

### **Obtaining UW Student Status for Non-UW Student Participants**

IPE obtains non-matriculated UW student status and UW student numbers for any non-UW students who are accepted to participate in UW departmental programs. This non-matriculated status and student number allows non-UW students to create a UW NetID, to use the MyUW personal page to track program payments, enrollment, grades, etc and to be eligible to concurrently enroll in the UW during participation in the program. The fee for this is a non-refundable \$200.

Program directors who accept non-UW students to participate in programs should request that these students submit the non-matriculated application for non-UW students (found in *Appendix T*) to IPE.

### **Processing Student Withdrawals and Refunds**

IPE collects withdrawal forms from any students who decide to withdraw and shortly thereafter determines and processes refunds for any withdrawn participants according to the program withdrawal policy. In addition, IPE reviews and processes Petitions for Emergency Withdrawal from students who experience severe hardship that leads them to withdraw before or during the program. Please see *Appendix U* for the withdrawal form and *Appendix V* for the petition for emergency withdrawal.

### **Producing Pre-Departure Checklist for Students**

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The IPE prepares a general checklist that outlines the tasks that students need to complete in order to successfully prepare for study abroad. This checklist covers everything from getting a passport to attending the mandatory pre-departure orientation to getting involved in the UW “international scene” before actually leaving Seattle soil. Program directors may want to tailor this checklist to incorporate any additional program-specific pre-departure meetings or requirements, and they will certainly want to distribute it to students along with program acceptance information. Please see *Appendix S* for the IPE student pre-departure checklist.

### **Providing Financial Aid, Scholarship and Insurance Resources to Students**

**Financial Aid and Scholarships:** IPE maintains information regarding financial aid and scholarships on its website and in its reference library. Program participants can utilize most forms of financial aid during their participation in UW departmental programs. IPE advises any financial aid recipients who are planning to study abroad to contact the Financial Aid Office to verify that their awards will apply. Students who are interested in applying for increased financial aid during their quarter(s) of study abroad are encouraged to submit a Financial Aid Revision request to the Financial Aid Office. In order to do so, students must obtain a budget of student expenses from the IPE, complete a Financial Aid Revision request form from the Financial Aid Office and submit both to the Financial Aid Office.

IPE is happy to provide students with additional advice on applying their financial aid to the cost of their foreign study programs. Students are welcome to make individual or group appointments with the fiscal team at IPE.

**Insurance Resources:** The University of Washington *strongly* recommends that students maintain major medical insurance coverage (that covers them internationally) *and* emergency travel insurance while studying abroad. More information about insurance can be found on the IPE website. Students wishing to purchase the UW Accident and Sickness Insurance Plan while studying abroad *must* do so through IPE by submitting the UW Accident & Sickness Insurance Purchase Request form (found at <http://ipe.washington.edu>) to IPE by the required deadline.

### **Organizing General Orientation**

FIUTS and the IPE organize a quarterly orientation meeting for foreign study participants who will be departing to study abroad during the following quarter. The orientation meeting is mandatory and is a forum in which the members of FIUTS and IPE go over important study abroad issues with departing students. FIUTS and IPE representatives cover the following:

- concurrent enrollment and registration,
- health insurance,
- credits and grades,
- pre-registration for later quarters,
- culture shock/re-entry shock,
- health, safety and security.

In addition to the topics outlined above, FIUTS and the IPE also facilitate country-specific break-out sessions in which departing study abroad students have the opportunity to talk with past program participants and visiting international students about the country/region in which they will be studying. Specific dates and details regarding the general orientation can be found on the FIUTS website [www.fiuts.org](http://www.fiuts.org) or by contacting the manager of education outreach at FIUTS ([outbound@fiuts.org](mailto:outbound@fiuts.org)).

### **Managing Program Funds**

IPE manages the program funds for most departmental programs. In addition to charging student accounts for program payments, its representatives make payments to foreign vendors, administer the field advance and purchase faculty and instructor airfare with program funds.

**Foreign Payments and Field Advances:** As this guide previously mentions in greater detail, IPE will work with the program director to determine what portion of the program funds can be spent before the program (through wire transfers to foreign vendors) and what portion should be given to the program director as a field advance. IPE will then assist the program director

## Section 2: Before the Program

in making these payments and in obtaining and accounting for this field advance. For field advance forms, please reference *Appendix K*.

Airline Tickets and Travel Expenses: IPE has a travel account and will purchase airfare for program directors and other faculty members and teaching assistants who are traveling with the program. IPE *strongly* recommends that program directors and other program instructors purchase their airfare according to the following system:

3. Reserve flight itinerary from a State Contract Travel Agency. Please visit <http://www.washington.edu/admin/travel/> for a current list of approved agencies.
4. Contact IPE at 206-221-4404 to have an IPE fiscal representative purchase the flight.

Program directors and instructors can also purchase airfare on their own and then request reimbursement from IPE. When doing so, faculty should still either purchase airfare from a State Contract Travel Agency *or* purchase a non-contract airfare according to UW Travel's list of acceptable reasons, located at <http://www.washington.edu/admin/travel/air.travel.html>.

Program directors who do choose to purchase their own airfare should bear in mind that reimbursement for airfare expenses can take up to two months to arrive. To request reimbursement for airfare purchases, program directors should submit their receipts and itineraries to the IPE fiscal team.

### **Concurrently Enrolling Students**

Concurrent Enrollment: IPE enrolls students who are studying on UW programs overseas via the concurrent enrollment process. Concurrent enrollment status confers to students all of the rights and privileges of regular, full-time enrollment except those that are supported by the Student Activities Fee. Thus, students who are concurrently enrolled retain their right to purchase UW Accident and Sickness Insurance, maintain their financial aid eligibility, receive graded UW credit for their coursework, maintain their residency status, keep their access to UW student email and retain their access to UW student services. They do, however, lose their privileges to use the IMA, Hall Health and UW Libraries during their period of concurrent enrollment.

When concurrently enrolling, students should NOT enroll using MyUW. Instead, IPE will enroll all participants in special Foreign Study (FSTDY) courses numbers depending on their program and UW student status (i.e. graduate or undergraduate).

Concurrent Enrollment and Health Screening form: In order to enroll students, IPE must receive their Concurrent Enrollment forms by the appropriate deadline. IPE will collect student concurrent enrollment forms, enter them into its database and enroll the students about a month before the program begins. Along with the concurrent enrollment form, it will also collect a health screening form (see *Appendix I* for the complete packet) and will notify the program director if any student has a medical condition that could potentially affect the quality of his or her experience on the program. Enrolled UW students can utilize their one free visit per quarter at the UW Hall Health clinic to cover the cost of this health screening.

It is important to note that under the Americans with Disabilities Act, no student can be denied participation on the basis of information reported by a physician on the health screening form. The UW collects information about students' health solely to help the program provide them with necessary support.

IPE fee: In addition to charging students for the departmental program fee, IPE will charge an additional IPE fee of \$200/quarter, \$300/semester or \$600/academic year to students who are concurrently enrolling for study abroad. This fee provides for the concurrent enrollment, orientation, financial aid eligibility, etc. of students. Information about this fee should be included in the program brochure, on the program webpage and in the program payment contract. Please see the samples in *Appendices D, E and G* and/or contact Melissa at IPE for further information.

Late fee: Concurrent Enrollment and Health Screening forms must be submitted to the IPE *together* by the appropriate deadline. Late or incomplete concurrent enrollment packets will incur a \$25 late fee.

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Conversion of FSTDY to Actual Credits and Grades: Students remain enrolled in the FSTDY course during the program. At the conclusion of the quarter, the program director must submit each student's grades to the IPE credit advisor using the grade report form (provided in *Appendix J*). The IPE will process the forms and forward them to Graduation & Academic Records where they will be recorded on the students' official transcripts.

### **Purchasing UW Accident & Sickness Insurance for Interested Students**

Students wishing to purchase the UW Accident & Sickness Insurance plan during their quarter(s) of study abroad are *not* eligible to do so via their MyUW personal webpages. Instead, they will need to submit the UW Accident & Sickness insurance purchase request form to IPE by the required deadline. Forms and further information can also be found on the IPE website, <http://ipe.washington.edu>.

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## Section 3: During the Program

### DEPARTMENTAL RESPONSIBILITIES

#### Communicating with Program Director

Before and especially during the program, the departmental program contact should arrange to keep the lines of communication to the program open via email and telephone. The departmental program contact should function as the program director's home departmental contact and should be ready and willing to offer assistance and advice to him or her as is needed.

#### Communicating with IPE

Both the home department and IPE should keep open lines of communication with the program director in the host country. Especially in the event of an emergency, it is very important that the department and the IPE are able to work together to provide support and assistance to the program director and UW students who are operating away from the UW's home campus.

In the event of an emergency, the home department, IPE and program director should follow the procedures outlined in the emergency preparedness plan for study abroad (see *Appendix L*).

#### Assisting Students with UW Home Issues

The departmental program contact will often be the person to whom students turn for information about how courses will fit into their major, what the availability of on-campus courses will be later in the year and how they should go about pre-registering for these courses. This person should help students find answers to their questions as they arise.

### PROGRAM DIRECTOR RESPONSIBILITIES

The program director is the on-site academic, administrative and diplomatic link between the UW and the host country and/or university. The director's duties are multiple and varied, but they are first and foremost academic. Program directors taking programs to the UW Rome Center should, again, refer to the Rome Center guide in *Appendix A* for additional information.

#### Teaching!

It is important to remember that all UW programs overseas are *academic* programs. Perhaps understandably, students sometimes lose sight of this fact! Successful program directors have been able to meld site and course materials in ways that make the programs unique educational experiences for all involved. Program directors are encouraged to bring in local experts who can help them utilize all of the academic and cultural benefits of the area, design excursions that take advantage of the site as a teaching tool and empower students to become skilled investigators of their new environments.

#### Staying Connected

The program director will additionally want to do his or her part to keep the lines of communication open between the program and the department as well as between the program and the IPE. As the program director is the on-site contact for the program, it is important for him or her to remain easily reachable at all times. Thus, the program director is required to have a cell phone. The cost of this cell phone should be factored into the program budget, and the number should be distributed to the departmental program contact, IPE, the local program coordinator and the program participants using the emergency contact information form in *Appendix M*.

It is important for the program director to keep both the department and IPE abreast any of development in the host country that could affect the welfare of the program. The program director should inform the department and IPE of major educational issues in the host country and of any changes in the structure and functions of its universities. The program director should proceed according to the emergency preparedness plan for study abroad (see *Appendix L*) in the event of an emergency.

#### Obtaining Cellular Service Overseas

Program directors are required to have working cell phones when leading international programs. There are several ways to gain cell phone connectivity abroad. Program directors should decide how often they intend to use their cell phones and should choose a convenient and economic cell phone plan accordingly.

### Section 3: During the Program

- Renting: You can rent a cell phone at the airport or through Cellhire ([www.cellhire.com](http://www.cellhire.com)) or WorldCell ([www.worldcell.com](http://www.worldcell.com)). Per-minute rates tend to be high (\$1-2+ per minute for incoming/outgoing calls) and weekly rental fees are generally between \$40 – 60.
- Using a U.S. cell phone abroad: Domestic U.S. cellular service uses a phone frequency that is different from that used by the rest of the world. Hence, most U.S. cell phones will not work abroad. AT&T Wireless, T-Mobile and Cingular Wireless, however, now have GSM networks and offer service that can be used throughout the world. If you have a “tri-band” mobile phone (i.e. one that works on all three GSM frequencies) and service with one of these companies, then your everyday U.S. cell phone/cell phone plan can be used throughout the world. Check with AT&T, T-Mobile or Cingular for more information about their international plans. Rates for using a U.S. cell phone outside of the U.S. tend to be quite high (between \$.99 and \$4.99 per minute), depending on the provider and the location from which the call is placed.
- Using a foreign cell phone abroad: If you have a tri-band (a.k.a. world) mobile phone or if you purchase a mobile phone overseas, then you can insert a foreign SIM card (the chip that runs the phone) into this phone and take advantage of the lower rates of the local cell phone provider in your host country. U.S. cell phone providers tend to sell “locked” world phones, which will not allow you to switch the SIM card. You will either need to figure out how to “unlock” your world phone by contacting your U.S. cell phone provider, or you will need to buy an “unlocked” phone overseas or on eBay. Local SIM cards are, by and large, sold at cell phone shops in the host country. They can also be purchased on websites like Telesial.com. They cost anywhere from \$35 – 100, and incoming calls are generally free. The cost of outgoing calls will vary and ranges anywhere from \$.25 for local calls to \$.60 for calls to the U.S. Every time you change countries, you will need to purchase a new SIM card and change your cell phone number (in order to avoid paying a higher, out-of-country rate). If you plan to travel through a number of different countries, you may want to look into the Telesial HopAbroad SIM card, which will allow you to keep the same number and the same rate as you move from border to border.

#### **Managing Field Advances**

The field advance is an amount of money issued to the program director to meet program-related expenses overseas. Field advances can be used for student room and board, faculty housing, local coordination, instruction, excursions, books, group dinners, etc. Accounting for the field advance is the responsibility of the program director.

This accounting process is relatively straightforward: for each expense, the field advance custodian (i.e. the program director) obtains a receipt and adds the expenditure to a ledger. At the conclusion of the program, the receipts (which should be divided into the five categories below) and the ledger (similarly arranged) are returned to the IPE for submission to General Accounting. This also occurs when unspent portions of the field advance are returned to the IPE.

The five categories of expenditure are:

- Supplies
- Services
- Research & Instruction
- Transportation, Food & Lodging
- Other

Forms, guidelines, sample ledger forms and sample receipts for the field advance are included in *Appendix K*.

Faculty Per Diem: Many program budgets include a modest per diem allocation for faculty of between \$17 and \$35 per day, depending upon the cost of living in the host country. This amount is designed to offset some of the costs of daily life on the program. It is the only portion of the field advance that does not require an individual receipt for each expenditure. The program director will sign a Travel Expense Voucher (provided by the IPE) at the conclusion of the program to account for this per diem.

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Timing of the Field Advance Accounting: General Accounting requires that field advances be accounted for "in a timely fashion". This usually means within a month of the faculty member's return to Seattle. IPE will work with the program director to set the appropriate date.

#### **Orienting Students On-Site**

The program director plays an important role in assuring the welfare of students on the international study program. He or she not only oversees the academic program but also orients students to the culture of the host country and counsels them on a range of social and practical issues. Therefore, the program director should be sensitive to problems that may impede students' acculturation while overseas.

Student exposure to the realities of study in a foreign context begins with the on-site orientation. The success of this orientation comes as a result of planning by the program director and local coordinator in terms of timing, content and relevance to the various situations in which the students will find themselves at the particular site. On-site orientation begins with the initial program director-to-student contact and continues throughout the duration of the program. Program directors should provide ample opportunity for orientation and reflection at intervals over the course of students' time abroad.

Although all participants will have taken part to some degree in both general and country-specific pre-departure orientation, the most important orientation takes place in the host country.

Below are some suggested orientation topics:

- Introduction of on-site personnel and, where appropriate, of key host university administrative personnel and faculty; descriptions of their functions; explanation and posting of office hours.
- Discussion of availability of dining facilities and eating options both on- and off-campus.
- Discussion of availability and use of local transportation.
- Review of medical and health facilities: what to do in a medical emergency, importance of having funds available for payment of medical and drug bills, procedures for reimbursement of medical expenses, policy concerning the use of the IPE Health Screening form.
- Distribution of housing information and regulations, etc., and of policies concerning housing problems and changes.
- Explanation of police registration (where required) and of host country regulations concerning drug use, political activism by foreigners, etc.
- Explanation of U.S. Consulate/Embassy registration.
- General introduction to the community and its physical surroundings.
- Presentation of host nationals or of local university students who are willing to answer questions or to serve as guides.
- Explanation of the respective roles of the program director, teaching staff and local coordinator.
- Discussion of what it means to be a student on an overseas study program. Students should be impressed with the importance of their role as ambassadors of UW in the host country.
- Coverage of the program director's policy concerning student academic obligations in relation to travel. Students are expected to attend classes regularly. Travel should be reserved for weekends and officially sanctioned vacation periods. Before extended travel, students are expected to inform the program director of their destination. If at all possible, they must leave contact addresses and/or phone numbers for use in emergency situations.
- Explanation of facilities for electronic mail and access to internet.
- Explanation of available facilities and general procedures for transferring and handling funds (e.g., bank accounts), distributing mail, etc.
- Discussion of procedures for financial emergencies.
- Presentation of measures that should be taken to ensure everyday safety and well-being, including the identification of areas in the city and its surrounding areas that should be avoided along with a general discussion of crime and common tricks used to dupe foreigners. In addition, depending on the country, a general discussion of emergency evacuation procedures may be necessary. Please bear in mind that the ability to contact students who are traveling is especially crucial in some locations; thus, a communication plan should be established.
- Distribution of the emergency contact information form to students (See *Appendix M*).

## **Section 3: During the Program**

### **Planning Trips and Excursions**

During the first weeks, students are usually highly motivated to explore their physical surroundings. Often, this drive can be channeled to enhance the goals of the program. In other instances, it needs to be stimulated and directed. In all cases, the development of a level of cultural understanding is crucial to the students' adaptation to their new environment. Organized excursions can be a very helpful part of orientation. Program directors should make efforts to provide insights into the nature of the society that the students are entering. Such instruction may prevent stereotyping or hasty conclusions about the new culture, based on narrow and unrepresentative observation. As a result of all of this, the program director should include at least some trips and excursions as part of the program.

It is the responsibility of the program to ensure the safety of program participants during program-coordinated excursions. During required trips and excursions, the program should provide transportation to and from the activity for students, arrange for accommodations that are safe and of reasonable standards and either provide meals or assure that meals are easily accessible. All means of transportation for the group should be arranged according to the University of Washington Policy on Transportation for Overseas Programs. Please reference this policy in *Appendix Q*.

The program director may also wish to suggest excursions to students that are not mandatory components of the program. In these cases, it is the student, not the program, who will be responsible for transportation, food and lodging.

### **Defining Program Activities**

It is important to remember that while program directors have overall responsibility for the group and the program, it is unrealistic (and psychologically unwise!) to expect them to provide 24/7 supervision. For this reason, it is critical to clarify to all players involved exactly what is, and what is not, a "program activity." In designing program activities, common sense is the key. Unless program directors can provide for the safety and security of certain activities, these activities should not be included in the program.

### **Ensuring Student Welfare**

Housing: The students' degree of satisfaction with the living situations abroad can often make or break their opinions of the program. It is important that these situations are adequate. When housing problems occur, it is the program's responsibility to mediate the problem and, when appropriate, to take steps to relocate the student(s) involved.

Taking the Pulse: One of the on-going responsibilities of the program director is to "check in" with program participants and periodically take their mental, physical and emotional pulse. While this is especially true of those students with pre-existing health concerns (about which the IPE will brief the program director before program departure), it is also true of the group as a whole. Program directors should consider it their responsible to continue to orient and advise students throughout the duration of the program, both formally and informally.

Health and Emergencies: Occasionally health problems occur that require the program director's special attention, e.g., serious accidents, pregnancy, mental or emotional breakdown, etc. The program director should be supportive while identifying medical or other professional help, as the situation requires. In all cases, the program director should use his or her best judgment to make any immediate decisions where time is of the essence and should then notify the appropriate U.S. contacts as soon as possible, according to the emergency preparedness plan for study abroad in *Appendix L*.

Political Climate and Conditions: The world's political climate is ever-changing. While out of the country, program directors should keep themselves and their students abreast of world issues and events and should take special note of developments pertinent to them in and around their host countries. They should stress global awareness to their students as the trait of a responsible traveler and should ask program participants to factor in the global state of affairs when determining their own self-comportment as foreign visitors and UW students abroad.

Student Emergency Contacts: In response to an emergency situation involving a particular student, the program director should contact the IPE, which will then contact the student's emergency contact. For emergency situations involving the entire group,

### **Section 3: During the Program**

the program site, or the entire country, the program director should proceed according to the emergency preparedness plan for study abroad in *Appendix L*.

Discipline and Dismissal: Programs directors will want to rely heavily on the student conduct contract (see the sample in *Appendix H*) during the program. In the event that student behavior is affecting either that student's quarter overseas or the group's well-being, the program director should follow these steps:

1. Inform the IPE directly by phone: 206/221-4404.
2. Meet with the student in question to assess the problem, outline the behaviors that are unacceptable and explore ways of correcting them.
3. Reach a verbal understanding with the student that the disruptive behavior will stop.
4. Keep contemporaneous notes of all contact with the student on this issue and of any relevant observations of the student and situation.
5. Monitor compliance.
6. Meet with the student again if trouble persists and provide him or her with a letter outlining the unacceptable behavior. This letter should be dated and should include a warning that failure to correct the behavior will lead to dismissal from the program.
7. Draft a contract for compliance with the student and have him/her sign it.
8. Monitor compliance.
9. Call the IPE director if trouble continues to persist.

In most cases, following these steps will solve the problem or, at least, will reduce it to an acceptable level. However, if dismissal from the program seems to be necessary, the program director should contact the IPE director immediately (David Fenner – office: 206-221-7745, mobile: 206-276-7290, home: 206-361-9338; Melissa Williamson direct line: 206-221-6137) for assistance with the dismissal process.

One of the chief challenges of program directors is the sense among program participants that "travel" to far away and exotic places is imperative. Students should be made aware at the beginning of the program of the ways in which absences from the program or class will affect their grades (which become part of their permanent UW record).

Sexual Harassment: The University of Washington and the IPE are concerned about sexual harassment abroad. Knowing how to identify harassment—whether it is between two students, between an instructor or staff member and a student, between a home-stay family member and a student—and where to report an incident can help to maintain a safe, harassment-free environment for all. The "UW Policy on Sexual Harassment" details methods of identifying and dealing with sexual harassment. This policy applies to individuals who are either students or employees, including contract employees, of the UW. Students should be made aware that this policy statement and procedures do not apply to students, faculty, and staff who do not have an affiliation with the UW. See *Appendix N* for the UW policy.

#### **NOT Purchasing Alcohol for Students with Program Funds**

It is OGA/IPE policy that University funds cannot be used to purchase alcohol for students participating in international programs and activities. Program directors must not use program or other university funds to buy alcohol for program participants.

### **IPE RESPONSIBILITIES**

#### **Communicating with Program Director and Department**

The IPE serves as the contact point for the program, both for the program director overseas and for the home academic department. Program directors should make sure that they complete the emergency contact information form and provide it to the IPE as soon as possible after the beginning of the program. This form can be found in *Appendix M*.

#### **Keeping and Releasing Student Emergency Contact Information**

### **Section 3: During the Program**

Similarly, when information about the program or individual students needs to be communicated, the IPE will provide this service. Program directors should contact the IPE directly in these cases.

#### **Providing Continued UW Support to Students**

It is important for students to understand that they are still linked to the network of UW student services while they are on overseas programs. This means that the Financial Aid Office, the Counseling Center, the Ombudsman and most other student services are still available to them. Students can link to these services by contacting the IPE directly or by speaking to their program director.

#### **Providing Support to the Program Director in Health Emergencies**

The program director should contact the IPE director or departmental program coordinator (David Fenner or Melissa Williamson) immediately, according to the emergency preparedness plan for study abroad (see *Appendix L*), if local health professionals cannot provide students, faculty, etc. with adequate healthcare treatment.

Contact information: David Fenner office: 206-221-7745, mobile: 206-276-7290, home: 206-361-9338.  
Melissa Williamson office: 206-221-6137.

#### **Providing Support to Program Director in Dealing with Disruptive Students**

Upon encountering disruptive students who violate the terms of the student conduct contract (see *Appendix H*) and endanger their own welfare or that of the group, the program director should follow the steps outlined under Discipline and Dismissal. If problems persist with the student(s) and dismissal from the program becomes necessary, the program director should contact the IPE director or departmental program coordinator immediately. The IPE will then assist the program director with the student dismissal process.

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## Section 4: After the Program

### DEPARTMENTAL RESPONSIBILITIES

#### **Reviewing Program Director Report and Student Evaluations**

The program director report can provide much insight into the relative success of a departmental program. It can also help determine what sorts of opportunities exist in the host country that could be included in future programs, and it can prepare future program directors for the challenges that they will face as faculty members in a foreign country. The student evaluations can additionally provide insight from student perspectives on how effective the program courses, excursions, housing situations and other amenities actually were. As a result of this, members of the department should take special care to review these submissions shortly after the end of the program and to draw from them in the planning of future programs. See *Appendix O* for a sample program director report and *Appendix P* for the student evaluation form.

#### **Submitting Student Grades to IPE Credit Advisor**

Upon completion of the program, the program director will assign or obtain their student's final grades and will submit these grades to the departmental program contact. It then will become the responsibility of the departmental program contact to organize each student's grades using the grade report form (provided in *Appendix J*) and to submit this form to the credit advisor at the IPE. The grades will then be processed by the IPE and forwarded to Graduation & Academic Records. In the event that the department does not have a departmental program contact who can take on the responsibility of submitting student grades to the IPE credit advisor, the program director will need to see the task to completion.

The departmental grades must be submitted to the IPE on the grade report form, which can be found in *Appendix J* of this guide or on the IPE website. When filling out this form, the departmental program contact (or program director) should clearly state the name and dates of the program in addition to the UW course number(s), (eg: CHID 498), the amount of credit, and the grade being awarded for each student. This person should be careful to submit all grades for all students together, to make sure that course numbers are valid for the program quarter and to refrain from submitting 'X' for any student's grade.

It is important to note that students cannot graduate with a FSTDY course on their transcripts. In addition, student financial aid for future quarters may be delayed if grades are not submitted in a timely manner. Thus, all departmental grades should be submitted within two weeks of the program's conclusion in order to avoid delays in student graduation or financial aid disbursement.

### PROGRAM DIRECTOR RESPONSIBILITIES

#### **Submitting Student Grades to Departmental Program Contact**

As official instructor of record, the program director will assign students' final grades after consultation with other professors or TAs of the overseas site. The program director will then submit these grades to the departmental program contact who will take care of putting them in the proper format and submitting them to the IPE. Please see *Appendix J* for the grade report form.

Program directors should note that the responsibility of submitting student grades ultimately lies with them. If the department lacks a departmental program contact who can oversee the submission of student grades to the IPE, the program director will need to ensure their arrival by following the steps previously outlined under "Submitting Student Grades to IPE Credit Advisor".

Whenever possible, program directors should avoid the use of incompletes for overseas study programs. These "I" grades have a tendency to hang over students' heads for months after they return and often affect how they view the entire experience. These can usually be avoided by providing enough time at the conclusion of the program for the completion and submission of all required work.

#### **Submitting Program Director Report**

Following the completion of the program, the program director should submit a brief report about the program, class work and students and also about the things that worked well *versus* the things that could have been done differently. The program director may wish to suggest alternative or additional activities, programs or partnerships that will enhance the UW's academic

## **Section 4: After the Program**

programs in the host country. This report is especially useful to future program directors, and it also provides a means of evaluation for departmental chairs and deans as they assess their continuing support of the program. See *Appendix O* for a sample program director report.

### **Reviewing Student Evaluations**

The IPE will collect and keep the student evaluations on display as a recruiting tool in the IPE reference library. As is mentioned before, the student evaluations provide student insight on how effective the program courses, excursions, housing situations and other amenities actually were. Program directors are encouraged to come read these evaluations and to use them to evaluate and improve programs from year to year. Please see *Appendix P* for the student evaluation form.

### **Accounting for Field Advance**

The program director will work with the IPE to submit all of the necessary documentation for the expenditure of the field advance funds. These include:

- unspent portion of the field advance, submitted by check to the IPE made payable to the UW;
- receipts for all program-related expenditures;
- perjury statement itemizing expenditures for which program director was unable to obtain receipts;
- ledger of expenditures;
- final accounting for field advance form;
- Travel Expense Voucher (if the field advance included per diem for faculty).

See *Appendix K* for more information regarding field advance documentation.

## **IPE RESPONSIBILITIES**

### **Assisting in Field Advance Accounting**

Upon completion of the program, there can be many financial loose ends to tie up and many parts of the field advance to account for. The IPE departmental program coordinator will work with the program director to help to complete the field advance accounting process.

### **Maintaining Program Budget**

In the interest of future programs and the IPE's desire to reduce the "reinvention of the wheel" phenomenon, the IPE will maintain in its records a budget for the program that can be used as the starting point for future programs run by the department. The IPE will make this budget available to departments and future program directors at any point.

### **Forwarding Student Grades to Graduation and Academic Records**

After the departmental program contact (or program director) has submitted the Grade Report Form for students, the IPE will process the students' grades and forward them to Graduation & Academic Records, where they will be added to the students' UW transcript. The IPE will function as a screen that will, ideally, ensure that any inconsistencies are taken care of before they have been recorded on the students' transcripts. The grade report form can be found in *Appendix J*.

### **Retaining Student Evaluations and Keeping Program Director Report**

The IPE will be responsible for keeping the student evaluations on display as a recruiting tool. Students who are interested in participating in future extensions of the program will be able to view these evaluations as a means of determining whether or not the program is for them. Program directors are also encouraged to come read these evaluations and to use them to evaluate and improve programs from year to year.

The IPE will also keep the program director report on file as a resource for future program directors. Please see *Appendices O* and *P* for the sample program director report and student evaluation form.

## Section 4: After the Program

### CONCLUSION

This sums up the IPE's overview of the elements that go into planning a departmental program for international study. If you have made it this far, you have definitely proven yourself to be program director material! Please make an appointment with Melissa Williamson, the IPE departmental program coordinator ([melissaw@u.washington.edu](mailto:melissaw@u.washington.edu)) today, and start the next leg of the departmental program planning process. This undertaking will bring about some of the most rewarding experiences that you and your students will have at the UW.

\*Special thanks to Melissa Williamson for the completion of the UW Departmental Planning Guide.

## SECTION 5: APPENDICES

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- Appendix A:** Rome Center Guide
- Appendix B:** Program Planning Checklist
- Appendix C:** Sample Program Budget
- Appendix D:** Sample Program Brochure
- Appendix E:** Sample Study Abroad Link and Program Webpage
- Appendix F:** Sample Program Application
- Appendix G:** Sample Student Acceptance Letter and Payment Contract
- Appendix H:** Sample Student Conduct Contract
- Appendix I:** Concurrent Enrollment and Health Screening Form
- Appendix J:** Credit and Grade Report Form
- Appendix K:** Field Advance Forms
- Appendix L:** Emergency Preparedness Plan for Study Abroad
- Appendix M:** Emergency Contact Information Form
- Appendix N:** Policy on Sexual Harassment
- Appendix O:** Sample Program Director Report
- Appendix P:** Student Evaluation Form
- Appendix Q:** Policy on Transportation for Overseas Programs
- Appendix R:** Sample Program Roster
- Appendix S:** IPE Student Pre-Departure Checklist
- Appendix T:** Non-Matriculated Application for Non-UW Students
- Appendix U:** Withdrawal Form
- Appendix V:** Petition for Emergency Withdrawal