

Faculty-Led Study Abroad Program  
Office of International Programs

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**Policies & Procedures**

**San Francisco State University is committed to serving students who wish to study abroad to support, enrich and broaden learning opportunities, engage with different cultures and gain an understanding and an appreciation of, the people, the culture and the places visited.**

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**① Program Policy**

- The program must be clearly educational in nature, and be pre-approved by the academic department and college via a signed **MOU** (or an **“AGREEMENT”** if you run your program through state support) between the Faculty Trip Leader (aka “Trip Leader”), their College and CEL each time the Faculty-Led Study Abroad Program is offered.
- If you run your program through CEL Self-Support, a Faculty-Led Study Abroad **CEL Special Sessions Academic Course Request Form** must be submitted to the Office of International Programs each time the program is offered.
- Academic credit must be offered and all participants must register officially for credit. Audit status may be requested. If audit status is granted, participant pays full fee, but receives “audit” instead of letter grade.
- Academic standards and requirements for a Faculty-Led Study Abroad program must meet the same academic standards and requirements as on-campus courses. One semester unit of credit is allowed per week of travel and study.
- Full or part-time SF State faculty may offer a Faculty-Led Study Abroad Program through SF State.
- The Director of Procurement and/or the campus President’s designee are authorized representatives for SF State University who may sign and approve all contracts with third-party vendors – hotels, restaurants, tour operators, travel agencies, etc.
- The Faculty Leader may not accept any student money. The Faculty Leader must work through a travel agency and/or airline company for payment of student’s airline tickets, lodging accommodations, transportation, etc. Students must make checks payable to the travel agency and/or airline for their share of the cost.
- If the program is run through CEL Self-Support, faculty may be compensated using the CSU 2322 Salary Schedule **and/or** may receive reimbursement of their travel expenses; however, the program cannot run a deficit and must generate sufficient income to cover all anticipated trip-related expenses & program overhead; Faculty who run their programs through state support will want to check with their department/college regarding salary, compensation, and reimbursement of travel expenses policies and procedures.
- It is critically important to make sure that all program/operating costs are covered by revenue (tuition) and that you develop a **“Budget Shortfall Plan”** detailing how you intend to compensate the University for any budget shortfall if the program does not meet minimum enrollment requirements.

**② Course Objectives**

- To provide teaching and learning opportunities that combine conventional coursework with on-site observations and study in international locations;

- To provide faculty with opportunities for increasing knowledge in their field, making contacts with colleagues in other countries, and bringing back ideas beneficial to campus program enrichment;
- To provide the University with visibility in other countries;
- To provide students with short-term experiences and learning in international locations;
- The program must include student learning outcomes and assessment process.

### ③ Faculty Responsibilities

- Schedule an “In-Take” meeting with Mr. Jay Ward, Associate Director, Office of International Programs to review program contents, budget, risk management issues and policies and procedures
- Read the information contained in ***Policies & Procedures and Managing Emergencies Abroad***. These documents are also available on the OIP website at: <http://oip.sfsu.edu/facultyleader>. The Faculty Leader will sign a separate letter acknowledging that they have read and agree to follow these policies and procedures as presented in these documents.
- In accordance with CSU Executive Order No. 1081, the Faculty Leader will register participants online before departure from the U.S. Department of State web site at: <https://step.state.gov/step/>. The Faculty Leader will also locate the closest U.S. Embassy to their destination(s) by visiting: <http://www.usembassy.gov/> and provide students with Embassy contact information. The Faculty Leader will then need to email Mr. Jay Ward, Associate Director, OIP confirmation that all travelers have registered their trip abroad.
- In accordance with CSU Executive Order No. 1081, the University will cancel the Faculty-Led Travel Study program if the U.S. State Department issues a “*Travel Warning*” to destination country, unless specifically exempted by the Chancellor.
- The Faculty Leader must travel with the group while abroad for the complete program.
- Faculty Leader must advise all participants of any high-risk physical activities that may be required during the trip (i.e. extensive hiking, walking, climbing up hills, rock climbing, river rafting, scuba diving, etc.) prior to the program’s departure from the University.
- The Faculty Leader must fulfill the itinerary commitments, or their reasonable equivalents.
- During the program, the Faculty Leader is responsible for knowing whereabouts of all students at all times.

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| <ul style="list-style-type: none"> <li>▪ The Faculty Leader will complete an Incident Report (<a href="http://oip.sfsu.edu/facultyleader">http://oip.sfsu.edu/facultyleader</a>) if an emergency situation arises during the program email immediately to Mr. Michael Beatty (<a href="mailto:mbeatty@sfsu.edu">mbeatty@sfsu.edu</a>), Risk Manager and to the Mr. Jay Ward, Associate Director of the Office of International Programs (<a href="mailto:jward@sfsu.edu">jward@sfsu.edu</a>).</li> <li>▪ Consult the <b><i>Managing Emergencies Abroad</i></b> manual for complete instructions on how to handle an emergency abroad.</li> </ul> |
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- Inform students of the mandatory SFSU Risk Management travel insurance (approximately \$60-140 per student—this amount is subject to change and SF State has no control over the final amount which is based on trip destination and other factors). Faculty Leader and students will receive Travel Insurance Cards to keep with them during the duration of the program. Faculty Leader and each student will receive a Travel Insurance coverage summary.
- If Faculty Leader, Teaching Assistant or program volunteer drive while abroad, they must have satisfactorily completed a CSU approved defensive driver course within the last four years.
- Faculty leader is also required to plan and conduct both a pre-departure orientation as well as an on-site orientation for all participants; please see Items 6 & 7 below as well as the chapter on “Creating a Successful Pre-Departure and On-Site Orientation Program” below.
- **In accordance with CSU Executive Order No. 1081**, the Faculty Leader agrees to complete an approved “emergency response” training course and provide OIP with a copy of your certificate of completion.
- Provide students with checklist including required vaccinations, recommended supplies and travel items, pertinent documents, list of required or recommended reading.
- Carry Participant List and copies of students’ passports at all times. Keep copies of all passports secure.
- Inform students that they will not be able to travel with the group if their class registration form with payment, reimbursement for travel insurance, Medical/Insurance Verification & Authorization Form, Release of Liability, Promise Not to Sue, Assumption of Risk & Agreement to Pay Claims and Student Agreement are not received in the Office of International Programs at least 60-90 days before departure.
- Read and enforce the Standards of Student Conduct at <http://bulletin.sfsu.edu/policies-procedures/regulations-procedures/student-conduct/> and <http://conduct.sfsu.edu/standards>
- Faculty Leader will work with Risk Management to arrange for the purchase of travel insurance for all participants including students and the Faculty Leader, teaching assistants and volunteers (if applicable) through SFSU Risk Management. The Faculty Leader must provide Risk Management with a re-charge/charge-back account number. Each student will then be responsible for reimbursing the specific academic department/college for travel insurance. Risk Management will provide the Faculty Leader, teaching assistant, volunteers(s) and each student with a Travel Insurance Card and insurance coverage summary.
- **In accordance with CSU Executive Order No. 1081**, the Faculty Leader will agree to attend a mandatory **“Faculty Leader Orientation”** planned and organized by OIP.
- A. At least **7 months** prior to departure, provide OIP with the following:
  - If you run your program through CEL Self-Support, a signed and completed Course Request form. (Please note, if the course is new or unauthorized, the trip leader must contact the curriculum coordinator to determine the best way to authorize or create a new course. This should be done very early in the semester.) The Country of travel must be approved by Enterprise Risk Management per the US State Department Guidelines.

- Trip Leader acknowledgement of reading Faculty Handbook (to OIP).
- B. At least **7 months** prior to departure, the Trip Leader will provide OIP with the following:
  - Request to travel to High Hazard Country form to OIP (as required by Risk Management)
  - Detailed itinerary, including participant list (to OIP then Risk Management)  
This detailed itinerary will include names of hotels, their addresses, phone numbers and email addresses. Also include names of service providers and any instructionally related tours in destination country with contact information. Educational lectures must be scheduled daily with limited free time scheduled. [A detailed itinerary is needed before travel insurance can be purchased.] Notify RM/OIP of any changes to itinerary pre and post-departure.
- C. At least **60-90 days** prior to departure, provide OIP with the following:
  - Authorization to travel (to OIP then Risk Management)
  - Request for foreign travel insurance forms (to OIP then to Risk Management)
  - Faculty volunteer form (if applicable)
  - Provide OIP with verification that you have successfully completed an approved first aid course (with CPR) completion
- D. At least **60-90 days** before departure, the Trip Leader will provide OIP with the following for each student: (Note: All of these items must be bundled and provided to OIP in one batch).
  - Class registration form with payment
  - A separate check for travel insurance reimbursement
  - A Medical/Insurance Verification & Authorization Form
  - A signed Release of Liability, Promise Not to Sue, Assumption of Risk & Agreement to Pay Claims
  - A signed Student Agreement
  - Xerox copy of student and faculty passports
  - Verification of successful completion of certified first aid course
  - Pre-Departure Student "Health & Safety" Orientation given by OIP
  - Pre-Departure Faculty Leader Orientation program organized by OIP

#### ④ OIP Responsibilities

- OIP will direct/refer questions from prospective and enrolled students related to registration, fee payment and grades to the appropriate office(s)/individual(s).
- OIP will collect/forward above forms to the appropriate office/individual so that CEL may arrange to set-up courses and course sections for students each semester the study abroad experience takes place (if your program is fun through CEL Self-Support).
- At least **60-90 days** before departure, OIP will collect from the Faculty Leader the following for each student:
  - A Medical/Insurance Verification & Authorization Form
  - A signed Release of Liability, Promise Not to Sue, Assumption of Risk & Agreement to Pay Claims
  - A signed Student Agreement
  - Xerox copy of student and faculty passports
  - The Faculty Leader will also provide OIP a copy of their passport.
- OIP will give a brief Health & Safety presentation at a mandatory student Orientation Meeting and distribute related materials to students and the Faculty Leader. Included will be a reminder for participants to carry sufficient personal medication supplies with physician

documentation, eyeglass prescription, etc. This Health and Safety presentation must be documented by OIP.

- OIP will also organize a mandatory Orientation Meeting for the Faculty Leader which will cover such topics as: assessing/mitigating location and course-related risk; assessing and planning for trip operational risks; emergency preparedness/response/first aid and communications; role of faculty leaders; CEL course registration & fee payment procedures; Faculty Leader trip reimbursement policies & forms; issues upon return to SFSU.
- OIP will verify with the Faculty Leader that “in accordance with CSU Executive Order No. 1081, the Faculty Leader & all student travelers have registered students online before departure from the U.S. Department of State Web site at: <https://step.state.gov/STEP//> and have located the closest U.S. Embassy to their destination(s) by visiting: <http://usembassy.state.gov/> and provided students with Embassy contact information.
- Office of International Programs will maintain originals of the Participant List (includes Emergency Contacts), all registration forms, Medical/Insurance Verification & Authorization Forms, signed Release of Liability, Promise Not to Sue, Assumption of Risk & Agreement to Pay Claims, Student Agreements and Xerox copies of Faculty Leader and student passports.
- **In accordance with CSU Executive Order No. 1081**, the University will cancel the Faculty-Led Travel Study program if the U.S. State Department issues a “Travel Warning” to the destination country, unless specifically exempted by the Chancellor.
- Depending on the finalized budget, CEL (or your specific academic department/college) may or may not be able to provide Faculty Leader with their faculty salary for teaching the course abroad and/or reimbursement of all travel-related expenses if the program does not generate sufficient revenue to cover all trip-related expenses and overhead, which may necessitate cancelling it.

## ⑤ Safety, Security & Risk Management

General Precautions (Recommended by the U.S. State Department)

- Blend in with the population. Do not wear identifying clothing such as a baseball cap or shirts, or T-shirts or sweatshirts with identifying information.
- Avoid predictable patterns of behavior. Do not always take the same route or stop in the same restaurant every day. Vary your travel routes.
- Be alert and observant. Report any suspicious behavior, such as being watched or followed.
- Avoid or use very special precautions around U.S. military installations and airports. Do not take photographs of military installations or airports.
- Be watchful of abandoned bags in public places, or anything sitting free which could contain an explosive.
- Do not join demonstrations. If large groups of people are gathering, leave the area.

Personal Safety and Security Practices While Abroad

- Participants should keep their passport in a safe location at all times; they should always carry a driver’s license or other photo I.D., local emergency phone numbers (i.e. police,

phone number to reach Faculty Leader, hotel phone number, international travel assistance phone numbers, etc.).

- Be aware of your surroundings and belongings at all times. One should be especially careful at train, subway, or bus stations where thieves prey on visitors and tourists.
- Use a money belt to carry important personal information, cash, or traveler's checks. Men should avoid placing their wallets in their back pant pocket. Women with purses should hold their purses in front of their person.
- Travel only in well-lighted and frequently traveled areas. Avoid walking in alleys or unfrequented streets. Whenever possible, always walk with a friend or companion.
- Exercise common sense when responding to a crisis (i.e. political events or acts of war). Do not draw attention to yourself and avoid travel in the affected crisis area.

## ⑥ Student Pre-Departure Orientation Meeting (Mandatory)

- Review the final itinerary at the Pre-Departure Orientation Meeting, including modes of transportation, time differences, transfers and meeting points. Check all passports and visas (if necessary).
- Review the study abroad educational content; provide a reading list for all participants. Advise participants on course requirements, grading, expectations and evaluation.
- Remind students of the deadline to submit petition to audit the class, if needed.
- Review information regarding destination(s), i.e. cultural differences, geography, language, political climate, environmental conditions, religious considerations, etc. Discuss codes of conduct, including consuming alcohol, free time activities, etc. Remind students that each foreign country has its own laws and standards of acceptable conduct, including dress, manners, morals, drug use and behavior.
- Advise student participants that involvement in any high-risk activities (i.e. drug or alcohol use and abuse, violation of local laws, etc.) would subject them to the associated penalty for violations of the local and international laws of that host country.
- Advise participants that any violation of the acceptable standards of conduct could lead to sanctions consistent with the CSU Student Discipline Policies and Procedures, including, but not limited to suspension or expulsion from the program.
- Review emergency and crisis response plans with the Faculty Leader prior to departure. Review health and safety services at overseas locations. Know how to contact the local law enforcement, 911 equivalent or security offices in the host country. Student participants need to stay in close or regular contact with the Faculty Leader.
- For appropriate Student Conduct refer students to: <http://conduct.sfsu.edu/conduct/standards>
- Review level of strenuous physical activity involved, high-risk activities. Discuss any special medical needs with individual students.
- Provide tips regarding packing and using mobile, light luggage. Caution students to be extremely watchful of their cameras, handbags, etc.
- Discuss airport conduct. Keep your luggage with you at all times. Once you have checked in, make sure no one gets near your luggage. Report any unattended baggage immediately. Do not agree to watch someone else's bags, no matter how innocent the request may sound. Once you are packed, and especially at the airport, accept no gifts to be taken along from anyone, no matter how well you think you know them.
- Upon arrival at destination, do not answer any questions a stranger might ask about the program or its housing. Your reply to any question about your presence is that you are "just visiting."

- Provide a copy of Participant List to participants at the Orientation Meeting as well as to your department head and/or college dean, Risk Management and OIP.
- Inform students that you will be available at all times in case they need to reach you.
- OIP will give a brief Health & Safety presentation and distribute related materials to students as required. Included will be to remind participants to carry sufficient personal medication supplies with physician documentation, eyeglass prescription, etc. All students must be present for the Health and Safety talk; a separate talk must be given to any student who was not present.
- OIP will document the time, location and attendance of the Health & Safety orientation meeting.
- Participants declare roommate at Orientation Meeting (if necessary for double room assignments).
- If students are traveling alone to destination, advise them how to get to the hotel from airport or train station, approximate taxi fare, tipping, etc.
- Provide training on any equipment to be used on the program.
- Advise participants to avoid any known high-risk crime areas of the host country.
- **Provide a brief list of campus regulations and procedures to students. This includes: student conduct, what you need to know about drugs and alcohol at SF State, etc.:**  
<http://bulletin.sfsu.edu/policies-procedures/regulations-procedures/student-conduct/>  
and <http://conduct.sfsu.edu/standards>
- Inform students that if you are involved in a major crisis or emergency while abroad to call loved ones and University officials (Risk Management & OIP) to let them know your status.
- The Faculty Leader will also plan and organize an on-site orientation upon arrival in the host country (see below).

If there is a legitimate reason for someone not to attend the mandatory Pre-Departure Student Orientation Meeting, the Faculty Leader will contact the student by phone or email to arrange for the student to attend a make-up orientation meeting in order to cover the essential Orientation topics.

## ⑦ On-Site Orientation at Destination Country

Topics Should Include:

- Remind participants of safety precautions with money, purses, and cameras and of staying in a group while site-seeing.
- Remind students to inform you in advance if they will be absent from a particular event.
- Remind students to turn in their room key and pay personal bills before leaving hotels.
- Clarify tipping practices or expectations.
- Clarify the policy on baggage handling when moving from hotel to bus.
- Review student conduct and remind participants what is expected of them.
- Remind students of the deadline to submit petition to Audit.
- Review again the emergency and crisis response plans with the Faculty Leader. Review health and safety services at destination country. Review how to contact the local law enforcement, 911 equivalent or security offices in the host country. Remind student to stay in close or regular contact with the Faculty Leader.
- Proceed with the short, pre-arranged city tour either by bus or walking.