



Study Abroad/Away Orientation & Guide

This guide supplements the two OIE face-to-face Orientations described here and is intended to assist Units, Liaisons to the OIE, On-site Program Leaders, On-site Program Co-leaders, Assistants and other university personnel through program development, implementation and re-entry. We want to make these processes as comfortable and as worry-free as possible by sharing detailed information on the systems, policies and procedures that are in place.

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Contents

| | |
|---|----|
| Introduction | 5 |
| Does this Guide Apply to Me? | 5 |
| Should I Read This Whole Guide? | 5 |
| On-campus Partners Supporting Study Away..... | 5 |
| Resources | 6 |
| Study Abroad & Study Away Destinations | 6 |
| UW Oshkosh, System & State Policies for the Conduct of Study Abroad & Study Away Programs | 6 |
| Group Program Models | 7 |
| Pre-planning Orientation | 8 |
| Audience..... | 8 |
| Peer Audience..... | 8 |
| Student Audience..... | 9 |
| Roles & Responsibilities | 10 |
| Roles | 10 |
| The Unit | 10 |
| OIE | 10 |
| The Provost..... | 10 |
| Affirmative Action, HR & Administrative Services..... | 10 |
| Liaison to the OIE (abbreviated L in this guide)..... | 10 |
| On-site Program Leader (abbreviated OPL in this guide) | 10 |
| On-site Program Co-leader (abbreviated OPCL in this guide) | 10 |
| Responsibilities | 11 |
| Timing your Planning | 14 |
| Timeline, Deadlines and Responsible Parties | 14 |
| <i>Application to Offer a Group Study Away Program - Deadlines</i> | 15 |
| Participant Application to Study Abroad/Away - Deadlines | 16 |
| <i>Application to Offer a Group Study Away Program</i> | 17 |
| How to Apply | 17 |
| Approval Process | 17 |
| Adding Course Options after Program Approval | 18 |
| Program Development | 18 |
| Mission..... | 18 |
| Strategic Directions | 18 |
| Strategic Plan | 18 |
| College of Business..... | 18 |
| College of Education..... | 19 |
| College of Nursing | 19 |
| Division of Lifelong Learning and Community Engagement..... | 19 |
| University Studies Program (USP)..... | 19 |
| Learning Outcomes | 19 |
| Experiential Learning..... | 20 |
| Course Options | 21 |
| Syllabus | 22 |
| Program Dates | 22 |
| Effect on Curriculum | 22 |
| UW Oshkosh Academic Calendar | 22 |
| COLS Compensation Policies | 22 |
| Destination Events and Holidays..... | 23 |
| Federal Financial Aid | 23 |
| Program Location | 24 |
| Travel Itinerary | 24 |
| Professional & Academic Visits/Experiences | 24 |
| Venues | 25 |
| Transportation..... | 25 |
| Airport Transfers..... | 25 |

| | |
|--|----|
| Activities for a Subset of Participants | 25 |
| Individual Program Deviation | 26 |
| High-risk and Adventure Activities..... | 26 |
| Transportation & Excursions by Boat..... | 27 |
| Approval to Make Significant Changes to the Itinerary | 27 |
| What if I don't have this level of Detail? | 27 |
| Site Visit..... | 27 |
| Program Fee..... | 28 |
| Potential Program Fee Inclusions | 28 |
| Request for Proposals (RFP) & Contracting | 28 |
| Process..... | 28 |
| Provider Services..... | 29 |
| Insurance | 29 |
| Exceptions to the RFP Process..... | 29 |
| Booking Fees..... | 30 |
| Individual Program Elements | 30 |
| Changes to the Program Itinerary..... | 30 |
| Exceptions..... | 30 |
| Announcing a Program Fee | 30 |
| Program Fee as it Appears in Your Web Guide - Sample | 31 |
| End-of-Program Accounting..... | 31 |
| Participant Refunds..... | 31 |
| Disbursements to Participants or Others | 32 |
| Program Web Guide | 32 |
| Marketing & Advising..... | 32 |
| Roles & Responsibilities | 33 |
| They don't just sign up!..... | 33 |
| Repetitive Marketing..... | 33 |
| How? | 34 |
| When? | 34 |
| Brochures..... | 34 |
| Study Abroad/Away Fair..... | 34 |
| Prospective Student Challenges | 35 |
| Advising Compliments Marketing..... | 36 |
| Communication | 36 |
| Communicating with Students..... | 36 |
| Program Eligibility..... | 36 |
| Eligibility requirements for students:..... | 36 |
| Creating competitive programs; adding eligibility criteria:..... | 37 |
| Participation by applicants who are not students:..... | 37 |
| Participation by individuals who have not applied to join a program:..... | 38 |
| Participation by Dependents..... | 38 |
| Exceptions..... | 38 |
| Process for Approving Exceptions | 38 |
| Participant Application | 39 |
| Participant Application Process | 39 |
| Application Process - Deadlines Applicable to On-site Program Leader & Program Co-leader | 40 |
| Course Enrollment..... | 40 |
| Building Study Abroad/Away Courses in PeopleSoft..... | 40 |
| Class Start Dates..... | 40 |
| Class End Dates..... | 40 |
| Campus Deadlines for Building Courses in PeopleSoft..... | 40 |
| Course Registration..... | 41 |
| Student Payments & Financial Aid | 41 |
| Student Orientation | 42 |
| Orientation Options | 42 |
| Orientation Inclusions | 42 |

| | |
|--|----|
| Program-specific Orientation Developed by Liaison, On-site Program Leader, On-site Program Co-leader | 43 |
| Program Leader Orientation | 45 |
| Required Attendance | 45 |
| Documents To Take with You..... | 45 |
| On-site Responsibilities | 45 |
| Communicating with Campus..... | 45 |
| On-site Orientation | 45 |
| Travel Advance, OIE Travel Expense Report (TER), and E-reimbursement - Process | 46 |
| Reimbursable Expenses (examples related to Leading a Group Program) | 48 |
| Expenses Not Reimbursable (examples related to Leading a Group Program)..... | 50 |
| Health Insurance | 51 |
| Cultural Insurance Services International (CISI) -for students and On-site Program Leader/Co-leader | 51 |
| Europ Assistance State of Wisconsin employee travel assistance and insurance | 52 |
| Workman’s Compensation for State employees (work-related vs. non-work-related illness or injury) | 52 |
| Risk & Crisis Management..... | 52 |
| CDC, Medications & Immunizations | 53 |
| Rights, Responsibilities & Personal Liability | 54 |
| It’s your reputation! Protect it!!..... | 54 |
| Thank-you’s..... | 55 |
| Post-travel Evaluation | 55 |
| Post-program Re-entry and Assessment | 55 |

Introduction

**A mind that is stretched by a new experience
can never go back to its old dimensions.**

Oliver Wendell Holmes, Jr.

Does this Guide Apply to Me?

This guide applies to you if

- your program will be approved for academic credit by UW Oshkosh and
- if your program will take place, in whole or in part, outside the geographical boundaries of the United States and
- if a UW Oshkosh employee will lead or accompany a group of any size which includes students.

UW Policy Guidelines extend standards of conduct to encompass the international activities of all University of Wisconsin employees and the international programs of all UW System institutions. Any employee involved in the development, management or implementation of student programming abroad is responsible for compliance with these policies.

Should I Read This Whole Guide?

You are about to spend *a lot of time and energy* developing, recruiting and implementing your program. But, if there isn't a perceived need for the program, if no one else in your department believes in your program enough to help you recruit, if you don't incorporate program elements which meet unit goals and work for your students, if you build a program that is not in compliance with UW System policies... your program could be a "no-go."

On-campus Partners Supporting Study Away

Office of International Education (OIE)

Provides support to professors, departments, units and colleges in the development and coordination of study away programs. Also responsible for direct enroll and student exchange abroad; international student recruitment and immigration advising; English language support & tutoring; coordination of short-term inbound group programming; the National Student Exchange; and serving as State of Wisconsin administrative center for the Hessen (Germany)/Wisconsin student exchange.

Affirmative Action

Conducts checks on all UW Oshkosh On-site Program Leaders and On-site Program Co-leaders and makes recommendations on terms of participation or on non-participation, as appropriate.

Cashier's Office

Posts study away student fees on students' accounts. Collects application fees, program fees and tuition fees from students. Issues receipts. Sends late payment notices.

College of Business Globalization Committee

Oversees global initiatives for the College of Business. Solicits *Applications to Offer a Group Study Away Program* and selects group leaders to plan study away programs. Approves study away programs.

Counseling Center

Advises individual students seeking services through the Counseling Center on the suitability of particular programs. Writes recommendations for participation when appropriate. Serves as a resource for students and On-site Program Leaders.

Dean of Students Office

Conducts disciplinary checks on all UWO applicants. Recommends terms of participation and non-participation when

warranted by disciplinary records. Follows up with disciplinary action for off-campus-related infractions when appropriate.

Financial Aid

Awards financial aid for study away and UW System Scholarships for study abroad.

Financial Services

Responsible for ensuring campus compliance with Department of Administration and UW System policy.

Human Resources

Conducts checks on all UW Oshkosh On-site Program Leaders and On-site Program Co-leaders and makes recommendations on terms of participation or on non-participation, as appropriate. In coordination with the OIE, processes contracts for retired On-site Program Leaders/Co-leaders and salary payments for On-site Program Leaders/Co-leaders receiving overload compensation.

Provost's Office

Approves or denies program applications and On-site Program Leaders/Co-leaders. The Office of International Education reports directly to the Vice Chancellor of Academic and Staff Affairs, who reports to the Provost.

Registrar's Office

In coordination with the OIE, registers students for study away courses.

Student Accounts

Sets tuition fees based on UW System tuition policies for study abroad.

Student Health Center

The travel clinic at the Student Health Center provides information on the Center for Disease Control's health care and immunization recommendations for travel abroad. The Health Center carries the most frequently used vaccines and will administer them for a fee. In addition, some countries require certification of physical and mental health in order to receive a visa. Students may obtain documentation of well-being by scheduling an appointment for a physical examination at the Student Health Center or with their family physician. Contact: Radford Hall First Floor, 424-2425.

Transcript Office

Provides transcripts upon request by the participant.

Transfer Student Coordinator

Provides transfer credit information for courses from other UW System institutions (some information is also available at <http://tis.uwsa.edu/wizards/>), other U.S. institutions, and foreign institutions.

University Studies Program

Oversees global initiatives associated with Quest III courses.

Resources

Study Abroad & Study Away Destinations

| | |
|------------------------------|---|
| UW Oshkosh destinations..... | www.uwosh.edu/oie/away/explore |
| UW System destinations..... | https://www.wisconsin.edu/international-education-engagement/study-abroad/ |

UW Oshkosh, System & State Policies for the Conduct of Study Abroad & Study Away Programs

All policies are available from <https://www.wisconsin.edu/uw-policies/>. Policies can and do affect study abroad/away and student travel even when they do not specifically mention study abroad/away or student travel.

Group Program Models

Everyone designs who devises courses of action aimed at changing existing situations into preferred ones.

Herbert Simon

Customized Program

A study away program organized specifically for students from a sending institution. The Liaison to the OIE is responsible for designing all academic components of the program, including developing program goals and objectives and writing a program itinerary that adequately supports program goals and objectives.

Planning a customized program typically involves coordination and booking in relation to some or all of the following: air and ground logistical support, accommodation, transportation, group or individual venue & entrance booking, on-site coordinators, academic visits within specific fields of specialization and more. Depending on program needs and on relevance to UW System policy, activities are coordinated using one or more of the following:

1. Customized Program Providers
2. Educational Travel Agencies
3. Non-profit Agencies
4. Travel Agencies
5. Partner Universities, Colleges or other Academic Institutions
6. Other partners as identified by the Liaison to the OIE

Direct Enrollment

A study away program offered and organized by someone else (not by UW Oshkosh). Students, typically from multiple institutions, may apply directly to the host abroad to enroll. The Liaison to the OIE identifies an appropriate course/s to award in transfer credit. The On-Site Program Leader supervises the group while away. Students are enrolled in courses offered directly by the host institution/organization and taught by the host, with grades awarded by the host.

Planning for direct enrollment typically involves coordination and booking of group airfare and potentially also ground transfers from the airport to the program site. All logistical support, accommodation, program-related transportation, group or individual venue & entrance booking, on-site coordination, academic visits within specific fields of specialization, etc. are typically planned and implemented by the host institution. Direct enroll programs are typically offered by

- Non-profit Agencies
- Third-party Providers (typically companies)
- Partner Universities, Colleges or other Academic Institutions

Hybrid Programs

A study away program which includes both direct enrollment and at least one customized component organized by someone other than the direct enroll provider.

Program Components

Each of the above models may also include:

- Service Learning
- Volunteer Work
- Field Study
- Internship (unpaid if short-term)

Pre-planning Orientation

What does it mean to pre-board? Do you get on before you get on?

George Carlin

The OIE was created to offer support to colleges & units developing and delivering programs abroad, to ensure university compliance with federal, state, system and institutional policies, and to implement best practice on campus. Our pre-planning orientation covers program design, the *Application to Offer a Group Study Away Program*, planning timelines, roles & responsibilities, relevant policies and more.

DO! If you have never worked with the OIE before, for a refresher, or to learn more about our processes, make an individual appointment with the OIE Director (424-0775, graff@uwosh.edu).

Audience

A squirrel dying in front of your house may be more relevant to your interests right now than people dying in Africa.

Mark Zuckerberg

Peer Audience

Developing support among and soliciting advice from colleagues is crucial. Failure to make your program relevant to colleagues and/or failure to solicit colleagues' advice when designing your program can lead to a program which you "own" alone. While this gives you more control over how the program will run, it can also mean that, later in the process when you ask others to help spread the word, your request may be met with little enthusiasm. What you need is for everyone to believe in the program and its benefits to students. So, share your ideas with colleagues now, include your colleagues in your decision-making process, incorporate the ideas of those who can help support the program whenever possible, and make the program "the unit's" program rather than your own.

DO! Introduce your program ideas to colleagues who have already worked on developing programs abroad or who have traveled abroad. If appropriate, use their advice to refine your ideas before bringing them to colleagues who have not led programs and to unit leaders.

You may want to share your ideas informally, or you may need to develop written materials or hold meetings with specific governance groups within your unit to share your program idea with your colleagues. Consider sharing draft learning outcomes and/or a draft program itinerary - and above all else communicate the value of your program and the supporting role it will play in advancing your unit's goals.

NOTE: Your unit may also have policies which address academic or program content, a committee that approves programs and/or specific expectations in relation to content in study away programs.

Roles & Responsibilities

It takes a village.

Hillary Rodham Clinton

Roles

The Unit

Colleges and departments are responsible for the academic content of the program, including program review and assessment.

OIE

The OIE is primarily responsible for activities that are not academic, such as risk management, logistics, the application process, compliance with institutional, system and state policies, collecting fees and making payments, etc. The OIE reviews and submits recommendations on program proposals to the Provost based on risk assessments and feasibility. OIE recommendations do not take academics into consideration; academic content is approved at the department, College/Unit and Provost levels. Positions in the OIE which specifically support Group Programming Abroad:

- Director: responsible for risk management, policy & compliance, oversight
- Program Manager (**abbreviated PM in this guide**): responsible for developing & implementing group programs
- International Financial Specialist (**abbreviated IFS**): responsible for budgeting, contracting, accounts payable/receivable
- Study Away Advisor (**abbreviated SAA**): responsible for developing advising materials, including all web content & orientation
- Front-line Advisor (**abbreviated FLA in this guide**): responsible for the study away student application process, including intake and correspondence on the process with individual students

The Provost

The Provost makes final decisions on program applications based on academic content, risk assessments and feasibility.

Affirmative Action, HR & Administrative Services

The OIE shares a list of all prospective On-site Program Leaders, Co-leaders and Assistants, and any other university personnel who will accompany the group abroad, with the Affirmative Action Office, HR and Administrative Services. Affirmative Action and HR share any issues or concerns directly with the Provost, who makes final decisions on participation by university personnel. No confidential information is shared with the OIE. Administrative Services advises on staff with a past due Cash or Travel Advance. Staff with a past due advance are not eligible to receive an additional advance.

Liaison to the OIE (abbreviated L in this guide)

The Liaison to the OIE communicates decisions related to program development and delivery to the Program Manager in the OIE and communicates program changes and updates to his/her unit administration. There is only one Liaison per program; all decision-making at the unit level must be communicated to the OIE through the designated liaison. The Liaison may also include the OIE Program Manager and/or other OIE staff in conversations or seek input when appropriate. The Liaison may also serve as the On-site Program Leader and may also teach one or more of the program courses.

On-site Program Leader (abbreviated OPL in this guide)

The On-site Program Leader is responsible for providing leadership for the group and for overseeing group health and safety. The On-site Program Leader may also teach one or more of the program courses.

On-site Program Co-leader (abbreviated OPCL in this guide)

The role of the On-site Program Co-leader should be clearly defined by the Liaison, the On-site Program Leader or the Unit. OIE recommends that roles and responsibilities be shared in writing with the On-site Program Co-leader.

Responsibilities

Whether you plan to offer a direct enroll program or a customized program, there's a lot to take care of when planning for study away. This list isn't comprehensive - the scope and depth of responsibilities will be different for each program - but offers an introduction to the work load and distribution of responsibilities involved in program planning. indicates that a particular person/unit always takes on this responsibility. indicates that there may be flexibility in determining who takes on a particular responsibility or that the responsibility may be shared.

| Program Development | OIE | Unit | L | OPL | OPCL |
|--|-------------------------------------|--------------------------|-------------------------------------|-------------------------------------|-------------------------------------|
| Determine program dates and length. | | | <input checked="" type="checkbox"/> | | |
| Maintain timely contact and actively participate throughout the planning, development, implementation and evaluation of the proposed program. Because the process requires discussion and face-to-face meetings over quite a number of months, including interim periods and summer, each party agrees to be available during break periods and to meet planning timeline deadlines. | <input checked="" type="checkbox"/> | | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Contact and schedule visits, speakers, presenters and others who may be part of the academic program abroad as necessary <i>when the On-site Program Leader has established contacts</i> ; if the professor/unit does not have the necessary contacts, the OIE can contract this out. | | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Contact and schedule internships, volunteer work, job shadow experiences, research opportunities, field work, etc. as necessary <i>when the On-site Program Leader has established contacts</i> ; if the professor/unit does not have the necessary contacts, the OIE can contract this out. | | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Set up cooperative agreements with institutions abroad which have been identified by the Liaison (requires Provost and Administrative Services approval). | <input checked="" type="checkbox"/> | | | | |
| Arrange for transportation between UW Oshkosh & the U.S. airport (if needed). | <input checked="" type="checkbox"/> | | | | |
| Arrange for transportation, housing, facilities (including classrooms space and technology), sightseeing, cultural events, etc. in the host country/s. | <input checked="" type="checkbox"/> | | | | |
| Contract with travel agents and/or airlines, hotels/hostels/universities, bus companies, etc. for bids following institutional, system and state policies. | <input checked="" type="checkbox"/> | | | | |
| Marketing & Advising | OIE | Unit | L | OPL | OPCL |
| Maintain a website with general study away information as well as information related specifically to each individual program. | <input checked="" type="checkbox"/> | | | | |
| Market study away in general (but not individual group programs) through print materials, classroom visits and classroom presentations, club/organization presentations, and two large study away fairs annually. | <input checked="" type="checkbox"/> | | | | |
| Advise students on study away in general, help direct students to programs related to a specific major/minor and offer information on financial aid and other issues related to the study away experience. | <input checked="" type="checkbox"/> | | | | |
| Solicit support on campus to promote the proposed program. | | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |

| | | | | | |
|---|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|
| Market the program over at least one full semester prior to the study away application deadline by, at a minimum, 1) visiting classrooms, 2) distributing brochures, 3) attending study abroad/away fairs (or finding someone else to represent the program at fairs), 4) and soliciting the help of others in the department to announce programs in classes and distribute brochures. | | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Correspond with students to answer questions and address concerns; forward all questions related to Financial Aid, program fees, student payments, course registration, course overload requests, special student admissions, disciplinary records and other administrative questions to the OIE. | | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Generate a sufficient number of enrollments to run the program. | | | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Administration | OIE | Unit | L | OPL | OPCL |
| Complete, obtain the required signatures from Chairs & Deans, and submit the required application form to the OIE. | | | <input checked="" type="checkbox"/> | | |
| Keep department Chairs, College Deans/unit heads and colleagues informed of program and academic changes. OIE communication is with the Liaison only; it is the Liaison's responsibility to share information within the Liaison's Unit as appropriate. | | | <input checked="" type="checkbox"/> | | |
| Serve as the main point of contact for participants; keep participants apprised of changes initiated by the liaison. | | | <input checked="" type="checkbox"/> | | |
| Delegate responsibilities to the On-site Program Leader and/or On-site Program Co-leader/s if appropriate and maintain oversight for these responsibilities. | | | <input checked="" type="checkbox"/> | | |
| Recommend programs to the Provost for approval. | <input checked="" type="checkbox"/> | | | | |
| Determine the program budget, with input from the Liaison to the OIE. | <input checked="" type="checkbox"/> | | | | |
| Liaise with Financial Aid, Student Accounts, Administrative Services, UARC, Registrar's Office, Admissions, Counseling Center, Dean of Students Office. | <input checked="" type="checkbox"/> | | | | |
| Approve/deny applicants to the program (optional). | | | <input type="checkbox"/> | | |
| Register students for classes. | <input checked="" type="checkbox"/> | | | | |
| Submit student and leader visa applications to consulates, if required. | <input checked="" type="checkbox"/> | | | | |
| Collect and disperse money associated with the program. | <input checked="" type="checkbox"/> | | | | |
| Select/purchase gifts for contacts abroad/away (optional, but must be budgeted!). | | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Send thank you notes to hosts, speakers, tour guides, presenters, etc. involved with the program, or assign these notes to participants. | | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Assess non-academic elements of the study abroad/away program. | <input checked="" type="checkbox"/> | | | | |
| Meet after each program to complete a formal, face-to-face program assessment. | <input checked="" type="checkbox"/> | | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |

| Academics | OIE | Unit | L | OPL | OPCL |
|--|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|
| Select/approve an appropriate course/s for the program. | | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | | |
| Collect information on courses taught by institutions other than UW Oshkosh; work with the College or Department to pre-approve all course transfer. | | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Determine program prerequisites. | | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Serve as instructor-of-record. | | | | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Assess program upon completion. | | <input checked="" type="checkbox"/> | | | |
| Orientation | OIE | Unit | L | OPL | OPCL |
| Provide all students with a mandatory pre-travel orientation. | <input checked="" type="checkbox"/> | | | | |
| Develop and offer at least one pre-travel session or written materials designed to prepare confirmed participants for the experience abroad/away. | | | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Attend the OIE On-site Program Leader orientation prior to every program offering, including training on emergency responses and crisis management. | | | | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| On-site Leadership | OIE | Unit | L | OPL | OPCL |
| Provide an in-country orientation. | | | | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Remain responsible for and available to participants for the duration of the program abroad/away, from UW Oshkosh departure to UW Oshkosh arrival (exceptions can be approved on a case-by-case basis). | | | | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Participate in all planned group activities (the program itinerary may include one or more pre-approved activities which require student participation only). | | | | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Monitor group dynamics and activities and intervene as needed. | | | | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Respond to participant emergencies/crises in accordance with UW Oshkosh emergency management plans. | | | | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Report inappropriate student behavior in accordance with emergency management plans. | | | | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Manage money allocated through a travel advance in relation to anticipated expenses while abroad/away and account for these expenses. With the OIE PM, determine whether the On-site Program Leader or the On-site Program Co-leader/s will manage group expenses. | | | | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Administer & submit program evaluations. | | | | <input checked="" type="checkbox"/> | <input type="checkbox"/> |

Timing your Planning

Observe due measure, for right timing is in all things the most important factor.

Hesiod

Planning may proceed more quickly than outlined in the planning timeline. However, if key deadlines are missed in the planning process, the program may be rescheduled to run in a subsequent year.

Timeline, Deadlines and Responsible Parties

| Deadlines | | Goal | Responsible Party/ies |
|---|-----------------------|---|-----------------------|
| Fall Interim/Spring Semester | Spring Interim/Summer | | |
| Before you begin your application. | | Before you begin your application: <ul style="list-style-type: none"> • Review this Orientation Guide. • Schedule and complete a pre-planning orientation in the OIE. • Review your Unit's Mission and Goals; develop learning outcomes which support your Unit's Mission and Goals; develop a program concept to incorporating these learning outcomes. • Share your program concept and learning outcomes with colleagues within and outside of your Unit; develop Unit support. • With approval from your Unit leaders, introduce your program concept and learning outcomes to students; solicit feedback. • Develop a program itinerary that supports the learning outcomes. | L, OPL, OPCL |
| Before you finalize your application for signature. | | Before you finalize your application for signature: <ul style="list-style-type: none"> • Complete the <i>Application to Offer a Group Study Away Program</i>. • Submit a draft electronic copy (Word format) of the <i>Application to Offer a Group Study Away Program</i> to the OIE Director for review and comment. | L |
| By your unit's internal deadlines. | | Submit the <i>Application to Offer a Group Study Away Program</i> for approval within your unit. Request that your Dean (Director for CNL programs) forward your signed <i>Application to Offer a Group Study Away Program</i> to the OIE by the application deadline. | L |
| Feb 28 | May 5 | <i>Application to Offer a Group Study Away Program</i> deadline. No late applications accepted. | L |
| Mar 10 | May 15 | The OIE Director will <ul style="list-style-type: none"> • review your <i>Application to Offer a Group Study Away Program</i>, • complete a risk assessment as appropriate, • send the names of all prospective On-site Program Leaders, On-site Program Co-leaders and any other university personnel who will accompany the group abroad/away to Affirmative Action, HR and Administrative Services (Affirmative Action and HR share any issues or concerns directly with the Provost; Administrative Services advises on past due Cash & Travel Advances), • send a recommendation to the Provost. | OIE Director |
| Mar 25 | May 31 | Return approved and denied applications to the OIE | Provost |
| Apr 5 | Jun 10 | For approved applications, <ul style="list-style-type: none"> • the OIE PM contacts the Liaison to set up an initial planning meeting. • the Study Away Advisor in the OIE creates a web guide for the program. | OIE |
| Apr 5 | Jun 10 | Begin marketing the program. | L, OPL, OPCL |
| Apr 5 | Jun 10 | Begin applying to the program. Students may not make a FINAL commitment until a | Applicants |

| | | | |
|-------------------------|-------------------------|--|----------------------------------|
| | | program fee is published. | |
| Apr 30 | Jun 30 | All initial planning meetings to discuss program itineraries and program concepts in detail are completed for all programs. | OIE PM & IFS, L (OPL, OPCL) |
| May 15 | Jul 15 | Create a formal Request for Proposals. Solicit bids for your program when appropriate. | OIE IFS & PM |
| Jul 31 | Aug 30 | Collect proposals and share draft program budget and draft program fees, based on each proposal, with the Liaison. | OIE IFS & PM |
| See detail to the right | See detail to the right | Submit the appropriate course detail to the department PA and request that courses be built in PeopleSoft. The department PA builds courses in PeopleSoft by the campus deadlines and submits details to the OIE: <ul style="list-style-type: none"> • Fall Semester Courses 2nd Friday in March • Fall Interim Courses 2nd Friday in July (of the year prior) • Spring Semester Courses 1st Friday in October (of the year prior) • Spring Break Courses 1st Friday in October (of the year prior) • Spring Interim Courses 1st Friday of Spring Semester • Summer Courses Last Friday in February | L |
| Aug 8 | Sep 15 | All meetings to discuss proposals and recommended program fees, and to discuss adjustments to the itinerary (if needed), are completed for all programs. | OIE PM & IFS, L (OPL, OPCL) |
| | | If needed, resend the Request for Proposals to all who bid if changes are significant and will have a significant impact on fees. If changes are small or there are no changes, award the program to 1 provider and resend the proposal with changes specified. | OIE PM |
| Aug 17 | Nov 10 | Based on a final itinerary, recommend a Program Fee to be used for marketing to the Liaison. | OIE IFS & PM |
| Aug 24 | Nov 15 | All meetings to discuss final Proposals and recommended program fees are completed. Contract is sent to partner (or received from partner) for signature. | OIE PM & IFS, L (OPL, OPCL) |
| Aug 29 | Nov 19 | Signed contracts sent to Administrative Services at UWO for signature. | OIE |
| Aug 30 | Nov 20 | Publish and announce the program fee. Program changes that will increase costs are not possible after the fee is announced. | OIE SAA |
| | | Students complete applications/make a final commitment by the deadlines. | Applicants |
| See below | See below | Participant study abroad/away application deadline. <ul style="list-style-type: none"> • Fall Semester - Last Friday in February • Fall Interim - 3rd Friday in September • Spring Semester - 1st Friday in October • Spring Interim (any program that begins before spring interim ends) - 1st Friday of Spring Semester • Summer - Last Friday in February • You may set earlier application deadlines if needed. | Applicants |
| See below | See below | Participants - 1 st Payment is Due | Applicants |
| See below | See below | Participants - Orientation | OIE SAA, L, OPL, OPCL |
| See below | See below | Participants - 2 nd Payment is Due | Applicants |
| See below | See below | On-site Leader & On-site Co-leader orientation (to be announced) | OIE Director |
| 3/31 (interim) | 12/15 | Post-program Review | OIE PM, OPL, OPCL, (optional: L) |

Application to Offer a Group Study Away Program - Deadlines

- Fall semester - due September 30 (one year prior to offering)
- Fall interim / spring semester - due February 28
- Spring interim / summer - due May 5 (one year prior to offering)

See chart above.

Application to Offer a Group Study Away Program

Reduce your plan to writing. The moment you complete this, you will have definitely given concrete form to the intangible desire.

Napoleon Hill

How to Apply

Do!

1. Complete the *Application to Offer a Group Study Away Program*, available as a fillable Word document from <http://www.uwosh.edu/oie/staff/forms>.
2. Submit a *draft* electronic copy, in Word format, of the *Application to Offer a Group Study Away Program* to the OIE Director for review.
3. After receiving feedback on your application from the OIE Director, submit the final *Application to Offer a Group Study Away Program* for approval within your unit.
4. Request that your Dean (Director for CNL programs) forward your signed *Application to Offer a Group Study Away Program* to the OIE by the application deadline.

Approval Process

1. The Liaison to the OIE signs the *Application to Offer a Group Study Away Program*, affirming that s/he will develop and implement the program as per the information provided in the application.
2. The Department Chair (or equivalent) signs the *Application to Offer a Group Study Away Program*, approving the academic content of the program, the program concept and the individual elements built into the program itinerary.
3. The College Dean (or Director in CNL) signs the *Application to Offer a Group Study Away Program*, approving the academic content of the program, the program concept, the individual elements built into the program itinerary, instructor salaries and any additional financial support the College or Unit intends to provide.
4. The OIE Director signs the *Application to Offer a Group Study Away Program*, noting any risk which may be associated with the program destination or design.
5. Affirmative Action and HR review prospective On-site Program Leaders, On-site Program Co-leaders and any other university personnel who will accompany the group abroad/away and share concerns directly with the Provost.
6. Administrative Services reviews prospective On-site Program Leaders, On-site Program Co-leaders and any other university personnel who will accompany the group abroad/away and advises on staff who have a past due Cash or Travel Advance. Staff with past due advances may not be approved to lead a program.
7. The Provost signs the *Application to Offer a Group Study Away Program*, approving the program to run once, provided the program is developed and implemented as per the information and itinerary provided in the application.

Adding Course Options after Program Approval

The Liaison to the OIE may request that additional courses be added to the study away course list even after the proposal has been approved. Before making this request, however, be sure to discuss adding one or more courses to your approved program with the chair/s of the department/s who signed your original *Application to Offer a Group Study Away Program*.

If appropriate, continue with your request to add courses by:

1. Speaking to the chair of the department (or unit head) to explain your program and make your request informally.
2. Completing the fillable form available from www.uwosh.edu/oie/staff/documents/courseaddition.doc . Include the name and title of the department chair (or unit head).
3. Sending the completed form to the department chair (or unit head).

Program Development

Always be prepared to start.

Joe Montana

Mission

The *University of Wisconsin System* mission is to develop human resources, discover and disseminate knowledge, extend knowledge and its application beyond the boundaries of its campuses, and serve and stimulate society by developing in students heightened intellectual, cultural, and humane sensitivities, scientific, professional and technological expertise, and a sense of purpose. Inherent in this mission are methods of instruction, research, extended training, and public service designed to educate people and improve the human condition. Basic to every purpose of the UW System is the search for truth.

The *University of Wisconsin Oshkosh* provides a high-quality liberal education to all of its students in order to prepare them to become successful leaders in an increasingly diverse and global society. Our dedicated faculty and staff are committed to innovative teaching, research, economic development, entrepreneurship and community engagement to create a more sustainable future for Wisconsin and beyond. High quality academic programs in nursing, education, business, social sciences, natural sciences, humanities, fine and performing arts, engineering technology, information technology, health sciences and applied and liberal studies—all delivered in an innovative and inclusive learning environment—lead to degrees at the associate, baccalaureate, master's and professional doctorate levels.

UW Oshkosh prepares graduates who are talented, liberally educated, technically skilled global citizens and are fully engaged as leaders and participants in civic, economic, political and social life. The University fulfills its learning mission through a commitment to providing a 21st century liberal education that is grounded in a set of student learning outcomes unanimously adopted by the Faculty Senate on May 13, 2008.

Strategic Directions

- Develop a Diverse, Engaged Community of Lifelong Learners and Collaborative Scholars
- Enhance Teaching Excellence, Active Learning and Dynamic Curricular Programs
- Foster Research, Intellectual Activity and Creative Expression
- Expand Regional Outreach and Domestic and International Partnerships
- Promote Representative Leadership, Responsive Shared Governance and Flexible Resource Stewardship

Strategic Plan

<http://strategicplan.uwosh.edu/>

College of Business

uwosh.edu/cob/about/strategy/core-values-vision-mission

College of Education

uwosh.edu/coehs/about/mission-vision

College of Nursing

<http://con.uwosh.edu/about-the-college/>

College of Letters & Science

<http://cols.uwosh.edu/about-the-uw-oshkosh-college-of-letters-and-science/>

Division of Lifelong Learning and Community Engagement

uwosh.edu/lfce/mission

University Studies Program (USP)

Any study abroad course may be designed to meet specific USP outcomes. However, only those courses approved by the USP committee will apply to USP requirements.

USP learning outcomes are:

Knowledge of Human Cultures and the Physical and Natural World

- Through study in fine and performing arts, humanities, mathematics and science, and social science

Skills, both Intellectual and Practical, including

- Identification and objective evaluation of theories and assumptions
- Critical and creative thinking
- Written and oral communication
- Quantitative literacy
- Technology and information literacy
- Teamwork, leadership, and problem solving

Responsibility, as Individuals and Communities, including

- Knowledge of sustainability and its applications
- Civic knowledge and engagement—local and global
- Intercultural knowledge and competence
- Ethical reasoning and action
- Foundations and skills for lifelong learning

Learning: Integrated, Synthesized, and Advanced, including Synthesis and advanced accomplishment across general and specialized studies

DO! Meet with your Chair to identify major program outcomes and University Studies Program outcomes which your off-campus programming will support.

- 1.
- 2.
- 3.
- 4.
- 5.

Learning Outcomes

DO! Define specific learning outcomes and their assessment components which support the University Studies Program and specific course outcomes you have identified...

For example, upon completion of course “X”, you the student will:

- Be better able to evaluate options and develop creative solutions within context;
- Demonstrate effective communication skills with non-native speakers of English;
- Have increased awareness of one’s “self” in relation to others;
- Understand the meanings of “perspective” and “adaptability”;
- Identify contemporary experts in X field;
- Have improved...
- Evaluate...

DO! ... then choose a destination, program elements and a program schedule that support your learning outcomes. Consider the following in relation to your learning outcomes:

- Country/city
- In-class academic studies (pre-travel, throughout travel, and/or post-travel)
- Field experience
- Internship
- Language study
- People-to-people immersion opportunities
- Research
- Speakers/lecturers
- Visits (museums, parks, theaters, tours, religious centers, galleries, government offices, libraries, exhibits, etc.)
- Volunteer work

When you’re finished, you should have the start of your syllabus, the start of your program design and a good idea on the number of days you’ll need off campus to accomplish your goals. And, you should have answered the question “Why should students study this particular topic – off campus?” If your program is grounded in the learning outcomes you’ve identified for your students, your objectives and your program schedule will begin to look a lot alike.

Experiential Learning

A man who carries a cat by the tail learns something he can learn in no other way.

Mark Twain

Your program will have an experiential learning component that is grounded in your learning outcomes. This component will challenge participants, which in turn leads to personal, academic and professional growth.

It is often assumed that the primary, and sometimes the only, experiential learning component of study abroad/away is cultural immersion. The expectation may be that your program offers a fully immersive experience simply because it is offered in a different country. A second assumption may be that your program doesn’t offer anything beyond the cultural immersion experience.

There are many reasons to study outside of the U.S., only one of which is to develop greater cultural competence. It’s quite appropriate to design a program which balances experiential learning components that directly support learning outcomes

with expectations that there will be at least some introduction to the host culture.

Identify and articulate this component and communicate this widely!

DO! Articulate the type of experiential learning you will offer through your program.

Determine the appropriate level of immersion for your program.

Identify program components that lead to a cultural immersion experience.

- _____
- _____
- _____
- _____
- _____

Course Options

Determine which courses will be offered on your program and for how many credits.

- Each College/Unit on campus has its own criteria for determining credit hours for study abroad/away programs. Some guidance is available for COLS courses on the *Application to Offer a Group Study Away Program*.
- In order for students who are using financial aid to participate,
 - interim programs must be at least one credit; participating students must have a minimum of 12 credits over the 17-week semester.
 - summer programs must be at least 3.5 credits (or, participating students must be enrolled in a minimum of 3.5 credits including summer courses taken on campus).

DO! Select existing UW Oshkosh courses,

- Official UW Oshkosh courses can be offered abroad/away with the approval of the Department Chair, College Dean and Provost.
- If your proposed study abroad/away program isn't a good fit for any of your department's other current courses, and if appropriate, use a Special Topics course.
- Much like cross-listing a course, more than one course number can be used as an option for the same course, provided this is approved by the Department Chair, College Dean & Provost. For example, students studying on program X would all attend the same course lectures, follow the same program itinerary and participate in the same program visits and events, but some students enroll in a 200 level course and others in a 400 level course. The syllabus for each course is different, as is the amount and/or type of outside work for the course.
- Independent Study may be an option for individual students undertaking special projects or with special course assignments, but isn't an option for groups of students. Students using an Independent Study course number must

meet university and unit eligibility requirements and must follow the normal university procedure to apply to do an Independent Study.

...create a new UW Oshkosh course,

- If the course you plan to offer is not an existing course and will not be a Special Topics course, submit the course for formal approval through normal university channels.

...or identify foreign course enrollment options.

- Academic units determine course and credit equivalencies following current university guidelines.
- Current transfer policies do not allow grades to transfer to UW Oshkosh with coursework. While the grade may appear on the university transcript, it will not calculate into the official UW Oshkosh GPA. Academic units may choose to 1) transfer in courses as per university guidelines, recording no grade on the UW Oshkosh transcript; 2) transfer in courses as per university guidelines, recording a grade on the UW Oshkosh transcript; or 3) build the equivalent UW Oshkosh course in PeopleSoft, assign an instructor of record, simultaneously enroll study abroad/away participants in this course and grade this course following unit policies.

Syllabus

DO! Clearly define On-site Program Leader and On-site Program Co-leader responsibilities. OIE recommends that you share these in writing, preferably through the syllabus, with program participants.

Program Dates

Your planned curriculum, federal and university policies and procedures, local holidays, and/or large-scale events may have an effect on your program.

Effect on Curriculum

- The number and location of venues offered through your curriculum, the amount of time students will need to complete coursework while abroad/away, the number of weekend days and weekdays you'll need, and the amount of personal exploratory time that you find to be ideal for your particular program will all affect program length.

UW Oshkosh Academic Calendar

- Study abroad/away program dates do not have to follow the official UW Oshkosh academic calendar. Programs abroad/away may start before or end after the regular semester, interim or summer term.
- You are not required to end your program or grade your program-related courses by the university grading deadlines. You may apply to extend course end dates to accommodate both a program that returns to the U.S. after the official semester end dates and/or to accommodate student assignments due after the official semester end date.
- Graduating seniors must be enrolled in courses that end by official UW Oshkosh graduation dates. The official graduation date is the final Friday of the 17-week term or the final Friday of the 8-week summer term. The OIE is able to request that the Provost allow a short extension to the graduation deadline for students participating in fall semester, January interim and summer courses only. Students participating in spring semester and spring interim programs that end after the official graduation deadline may walk in either the spring or fall graduation ceremony but must apply for summer (August) graduation.

COLS Compensation Policies

- COLS policy regarding overload compensation for faculty on curriculum modification plans may affect the timing of your program. Discuss this policy with your Chair to determine how the policy may apply in your case.

Destination Events and Holidays

- Check for destination holidays which may affect your ability to visit certain venues or schedule speakers.
- Consider U.S. holidays over which students may be reluctant to travel.
- Check for elections, international meetings and other large-scale events which may affect security in your intended destination.
- Some venues may be closed on certain days of the week.
- In areas with large Christian populations, it may be impossible to schedule visits or speakers between Christmas and January 6 (Epiphany/Three Kings Day).

Federal Financial Aid

- **Semester Financial Aid** processes during the first and second weeks of the academic term.
If you offer a full semester program with a departure date prior to the second week of the semester, keep in mind that your students' financial aid will not be available until after your program start date. This means that students using financial aid will need to have alternative funds available for the first few weeks abroad/away and will need to access financial aid from abroad/away, through their bank account, after program departure.
- **Interim Financial Aid** processes late in the semester, but prior to program departure.
- **Summer Financial Aid** processes during the first and second weeks of the Summer I session.
If you offer a summer program with a departure date prior to the second week of the Summer I session, keep in mind that your students' financial aid will not be available until after your program start date. This means that students using financial aid will need to have alternative funds available at the beginning of their program abroad/away and will need to access financial aid from abroad/away, through their bank account, after program departure.
- Financial Aid is associated with the term in which courses are built in PeopleSoft. If courses are built in PeopleSoft and associated with a semester, your program will be considered a semester or interim program. If courses are built in PeopleSoft and associated with the Summer I, Summer II or 8-week Summer Term, your program will be considered a summer program.
- Students may apply to pay fees billed to the student account AFTER payment deadlines if they plan to pay with Financial Aid, an outside loan or a scholarship. The *application* to pay late must be submitted by the payment deadlines. The application is called the "Notice of Financial Aid Award for Study Abroad".

DO! Work out potential program dates

- I need _____ week days.
- I need _____ weekend days.
- _____ % of my program participants will be graduating seniors.
 - I do do not need to consider ending my program by the official graduation deadline.
- _____ % of my program participants may be dependent on financial aid.
 - I do do not need to consider beginning my program after financial aid is awarded.
- The COLS policy regarding overload compensation does does not affect me.
- Destination holiday dates are: _____.
- U.S. holiday dates are: _____.
- Large-scale destination events or elections are to be held on: _____.
- Venues important to my curriculum are closed on: _____.
- I do do not need to avoid programming between Christmas and January 6.

My program's departure from the U.S. should take place on: _____

My program should arrive in the destination country on: _____

My program should depart from abroad/away on: _____

My program should be back in the U.S. on: _____

Program Location

DO! Consider the type of location that best supports your learning outcomes.

Any region of the world is fine.

Specific region of the world: _____

Any country is fine

Developing Nation

Specific country/countries: _____

Modernized Nation

Any city is fine

Large city

Specific city/cities: _____

Small city

Traditional population

Access to (types of activities) _____

Within walking distance to _____

Near city-wide public transportation

Within driving distance by coach to _____

Near intra-city public transportation

DO! Know how students, their parents/family and peers in your Unit and at UW Oshkosh will perceive the level of safety in your intended destination.

How has your intended destination been portrayed in the news over recent months/years?

Are there specific health or safety issues which may cause students not to travel? Or, cause family members not to support (and potentially not to help finance) travel? http://travel.state.gov/travel/travel_1744.html

Travel Itinerary

It is better to travel well than to arrive.

Buddha

A well-developed, well thought-out itinerary at the very beginning of the planning process is key not only to a smooth program abroad/away, but also to accurately and efficiently developing a program fee. The information you provide - and the information you don't provide - both have an effect! Your travel itinerary should include as much detail as possible, including, for example,

Professional & Academic Visits/Experiences

The itinerary in the *Application to Offer a Group Study Away Program* must include all professional & academic visits/experiences or, if the Liaison doesn't have any contacts and won't be responsible for setting these up, an indication of the number of visits needed, the number of required hours for each visit (if relevant) and the required topics/activities.

Venues

From the beginning of the planning process you must include all museums, parks, productions, field visits, professional visits and other venues, even if entry is free. Free entry doesn't necessarily mean that the venue doesn't cost. The number of venues, locations, access options and total time spent in each will affect the number of days you'll spend abroad/away and may affect transportation costs. Your itinerary should include:

- the formal name of the venue (no guessing or abbreviating!)
- the number of hours you plan to spend at each venue
- the time of day you want to visit each venue
- guide requirements for each venue (do you need one or more guides? English-speaking guide? Guide who can address a specific topic? Audio guides for each participant?)
- access requirements (do you need access to areas within the venue with a higher entrance fee? that require prior booking? that require special permission?)
- the general location of each venue (if known)
- transportation requirements for each venue (will you walk, ride the underground, require a coach, or take other public transportation?)

Transportation

Do you need transportation passes? For how many days? To include which zones?

Do you plan to use a rented or borrowed motorized vehicle? If so, this must be indicated on your application to lead a program abroad. There are strict UW System Policies in place that require specific liability insurance coverage by the vehicle rental agency or the vehicle owner and driver authorization for anyone who plans to drive. OIE will also need to review scenarios that lead to personal liability for the On-site Program Leader or driver when driving in a foreign country.

Airport Transfers

Will you need transportation between the airport and your accommodation? Will you use public transportation? Will you limit luggage or require a large coach?

Activities for a Subset of Participants

You may plan to have a subset of program participants engaged in activities which are not open to the full group. Activities may include:

- excursions
- program extensions
- mid-program break

For activities which are part of your academic curriculum (i.e. required of students taking one or more of the courses offered on your program but not required of students in other courses offered on your program), including program extensions:

- If there is no impact on cost or transportation, you may plan these activities at any time.
- If there is an impact on cost or transportation, the activities will generate a course fee for this subset of participants. All applicants will need to commit to the course fee; withdrawal and refund policies will apply to the course fee just as they would for the main program fee.
- You will need to determine in advance which group you will accompany and inform the group.
- All costs related to participation by the instructor of record for the course will be covered by those participating in the additional activity.

For activities which are not part of your academic curriculum (i.e. optional for all participants), including program extensions:

- If there is no impact on cost or transportation, you may plan these activities at any time.
- If there is an impact on cost or transportation, participants who choose to participate will pay the cost of participation on site directly to the provider. If the provider requires advance commitment, participants will apply directly to the provider and are responsible for any withdrawal penalties if they later choose not to participate on the full program or the optional activity.
- Either the On-site Program Leader or the On-site Program Co-leader (if there is one) accompanies or remains available to the main group.
- If there is an On-site Program Co-leader, either the On-site Program Leader or the On-site Program Co-leader may choose to participate in the optional activity at their own expense, paid directly to the provider.

If you choose a program extension that is optional for all participants:

- You will need a greater number of program participants in order to ensure that your groups can fly together.
- For the OIE to hold group airline tickets for both the main group and the group that is extending, you will need a minimum of 10 people (including On-site Program Leaders/Co-leaders) on both the main group and the group that is extending (20 people total).

Individual Program Deviation

Individuals on your program may request a personal deviation (i.e. plan an excursion, program extension or mid-program break activity on their own) with permission from the Liaison or On-site Program Leader.

Individual students who want to plan a personal deviation that affects their arrival or departure date are required to apply to OIE to deviate by the STEP II student application deadline. Students may not request a deviation after the STEP II student application deadline. Deviations do NOT generate a refund for missed venues or unused tickets; participants who deviate may be required to pay for their airline tickets directly or may be considered part of the group block and pay airfare to UW Oshkosh. In any case, your group must maintain a minimum of 10 on both the outbound and inbound flights so that you don't lose your group airline contract. If your total group enrollment is expected to be near 10, no individual program deviations will be allowed.

While most students request deviations for great reasons, and we're happy to support and even promote deviations whenever possible, examples of reasons why a student may not be approved to deviate include:

- Program Leader does not allow deviations from the program itinerary.
- Deviation request causes unexcused absence from class or academic programming.
- Private transportation brings the student group directly from the arrival airport to a location not safely served by public transportation (a student who may be delayed in meeting the group at the arrival airport could not otherwise safely reach the program site on their own).
- Sufficient site security concerns, such that a student should not be, or arrive, at the program site without a group.
- Student disciplinary record on campus includes incidents which, if repeated abroad, could lead to a student health or personal security risk.
- The request will impact our ability to maintain a group flight.
- Distance from the destination airport to the program site is too great for a transfer to be completed in a single day.

High-risk and Adventure Activities

The UW System-negotiated International Health Insurance policy does not cover injuries sustained while taking part in mountaineering where ropes or guides are normally used, hang gliding, parachuting, bungee jumping, racing by horse, motor vehicle or motorcycle, parasailing or other high risk or adventure activities.

You may not include high-risk or adventure activities not covered by insurance on the formal itinerary or informally while abroad/away.

High-risk or adventure activities which are covered by insurance may be possible, but only with prior approval by University of Wisconsin legal and only if strongly grounded in the academic curriculum. If high-risk or adventure activities are to be offered, UW Oshkosh requires the name and contact information of the company providing access to the high-risk or adventure activity; a copy of all forms and information the company makes available to customers prior to participation, including waiver forms; and proof of insurance covering the high-risk or adventure activity. The Office of International Education is required to submit these materials to University of Wisconsin legal counsel before high-risk or adventure activities can be included in the itinerary or offered as optional activities to our students.

Transportation & Excursions by Boat

Transportation or excursions by boat may be possible, provided the OIE has the name and contact information of the company providing this transportation, a copy of all forms and information the company makes available to customers prior to participation, including waiver forms; and proof of insurance. All boats must carry sufficient life jackets for all passengers on board.

Approval to Make Significant Changes to the Itinerary

Your program is approved by administrators at UW Oshkosh based on the full program application, including the program itinerary. Significant changes to the itinerary, for example, a change in presenter topic, any change related to the academic program, a change in destination, etc. will require approval by the same administrators who originally approved the *Application to Offer a Group Study Away Program*.

Changes to the mode of transportation, altering the order of events without affecting the program elements offered, changes to accommodation where accommodation is not linked to academic programming, etc. will not require additional approval.

What if I don't have this level of Detail?

If you don't have this much detail, provide as much information as you possibly can in your first draft itinerary. Plan to meet with the OIE Program Manager PRIOR TO SUBMITTING YOUR APPLICATION FOR APPROVAL so that you can discuss and finalize details as they relate to the items above. Plan far enough in advance to accommodate this additional meeting and still submit your application by the application deadlines.

Site Visit

If you haven't already visited the proposed site/s, or if further visits are required before the program can be developed, request preliminary approval of your proposed program from your unit leader and Dean *before* completing a visit.

The OIE does not collect fees from study abroad/away students to fund future program development. Funding for program development must come from within your College or Unit or from a source such as:

- [Office of Grants and Faculty Development Program](#)
- [External Sources](#)

DO! Before finalizing the arrangements for your site visit, make an appointment with the OIE Director to discuss information you will want to bring back from your visit to share with the OIE to aid in program development. Be sure that the OIE is aware that you have a new program in the development stages. Due to staffing constraints, OIE supports a limited number of programs each year.

Program Fee

If you can count your money, you don't have a billion dollars.

J. Paul Getty

Calculating an accurate fee for your program requires a fully-developed travel itinerary, receipt of Proposals from reputable educational travel providers or partners abroad who are experienced in supporting groups of study abroad students, adherence to travel policies, and adherence to financial policies.

Your fee must include all expenses you and your students may incur in relation to your program, unless these expenses are clearly identified in the OIE web guide for your program as not included in the program fee but covered directly by students before, during or after the program. The OIE does not receive tax payer funds to supplement programming and does not collect fees from students on one program to supplement students on another program. So, it's extremely important that we get the fee correct!

Potential Program Fee Inclusions

- Airport taxes (if not included in the airline ticket)
- Bottled Water (if provided to the group on a daily basis or for a particular event)
- Bus transportation between Oshkosh and the airport
- Cell phone rental & minutes
- City tours
- Classroom & facility fees; classroom equipment; course-related equipment
- Donations
- Gifts
- Gratuities
- Hop on-Hop off bus
- International & Express Mail Fees
- ISIC (International Student Identity Card)
- Meals: one or more meals per day included in the program fee? Breakfasts at hotels? Group meals?
- Photocopies made on site or in advance
- Research Permits
- Safety gear
- Supplies
- Tourist Card (this is an entry permit in place in some countries; payable at the airport upon arrival)
- Uniforms
- Visa application & mail fees

Request for Proposals (RFP) & Contracting

Process

Once the OIE has a fully-developed itinerary and a full list of program fee inclusions from the Liaison, the OIE will drive the budget process. OIE staff will create an RFP, identify one or more providers to receive the RFP, collect proposals, create estimated program fees based on proposals, present these proposals to the Liaison, and meet with the Liaison to discuss them. The OIE will also request changes and secure formal, written contracts which conform to institutional, system and state policies or invoices from all providers.

The Liaison to the OIE may request that particular travel agencies, providers and/or vendors be included in the bid process.

The Liaison may choose to personally take care of some details with budgetary implications, but must indicate his/her intention to do so by completing the “responsible party” column in the daily itinerary in the *Application to Offer a Group Study Away Program*. Before taking on these responsibilities, there must also be clear written communication between the Liaison and the Program Manager detailing the task/s, and the Liaison must agree to follow institutional, system and state policies when sending RFPs or requesting invoices or price estimates. All documentation related to the process, including copies of the original RFP and evidence of RFP submission to individual providers, must be submitted to the OIE; **the Liaison does not have authority to circumvent the RFP process or to enter into or to sign any agreements or to make any commitments on behalf of the OIE or the University**. All agreements and contracts must be submitted by OIE staff to Administrative Services for formal review and approval. *Only the Director of Administrative Services can enter into financial contracts on behalf of UW Oshkosh. DO NOT SIGN ANY CONTRACTS YOURSELF; these cannot and will not be honored!*

Provider Services

The OIE contracts all program services out to a provider whenever possible. The value-added by using a Provider includes:

- ☆Seamless programming from airport pickup to airport drop off☆ (except where air travel must be pulled from the itinerary to comply with the Fox World Travel contract);
- Available to troubleshoot when issues occur;
- Provider often (depending on the contract) assumes the financial risk; when venue pricing changes and exchange rates fluctuate, cost increases are not passed on to the participants;
- Providers can provide billing statements for deposits or final payments early if necessary, allowing OIE to time payments when exchange rates look favorable or use currency purchased through forward contracts when exchange rates are favorable;
- Provider billing means only two payments by wire transfer, reducing cost by decreasing the number of transfer fees paid and avoiding credit card fees and internet booking fees;
- Providers often have negotiated rates and strong business relationships with hotels and transportation companies and pass these benefits on to UW Oshkosh;
- Providers book accommodation, transportation and venues that meet their safety standards and provide insurance certificates that cover all services, reducing the need for risk assessment on individual accommodation, transportation and venue providers and the need for each to meet insurance requirements;
- Provider services compliment OIE staff services, allowing OIE staff to support a greater number of programs.

Insurance

All providers must provide a copy of their Certificate of Insurance showing types of coverage and coverage expiration dates. Specifically, they must show evidence of “Commercial General Liability Gen. Aggr.” (general liability coverage for damages as a result of negligence). Providers should also add the “Board of Regents of the University of Wisconsin System, its officers, employees, and agents” as an additional insured under the commercial general liability policy whenever possible. Providers whose contracts involve transportation other than public transportation, must provide a copy of either their or their vendor’s Certificate of Insurance for “Automobile Liability Combined Single” (liability insurance covering automobiles).

Exceptions to the RFP Process

The OIE is not required to follow the RFP process, but is required to secure written contracts or formal written estimates (generally by email) prior to developing a program fee, if services will be provided directly by:

- a university partner abroad/away or other sole-source provider;
- a provider who has successfully delivered programs to UW Oshkosh OIE in the past, and where the outcome of the RFP process can be predicted based on past RFP outcomes;
- a specific venue for which the Provider cannot perform the booking service;
- a provider that is operating in a destination with no known competing, licensed providers available.

Booking Fees

Student fees are offset by state-funded salaries in the OIE. OIE staff provides a maximum level of state-funded support, as outlined below, for up to the equivalent of 30 short-term programs per calendar year. Additional state-funded support to offset study abroad costs is not possible at this time. Therefore, the OIE contracts out additional support to program providers and travel agencies. All students receive the same level of state-funded “free” support and, beyond this, pay for additional service either to a provider or, if the program components are related to the academic program, potentially through a “purchase” option offered by the OIE.

Individual Program Elements

The OIE will book a maximum of three individual program elements (including hotel, transportation, venues, etc.) outside of the provider contract at no additional cost to the program. Additional elements will be booked directly by the OIE only if the provider is unable to book them. These additional elements incur a \$100 fee per booking, charged to the program. These fees support OIE study abroad/away staff salaries not covered by state funding.

Changes to the Program Itinerary

Changes to program itineraries are inevitable, as venues may not be available or better opportunities may be recommended as planning progresses. To best serve prospective applicants, however, a program fee must be in place by the deadline specified in the planning timeline in this document.

- The Liaison may make as many changes to the program itinerary as required before the initial RFP is sent out for bid.
- The Liaison may make one set of additional changes to the itinerary after reviewing initial proposals and bids so that all changes can be sent to the provider at once.
- Changes to the itinerary after the second proposal has been received (or the initial proposal revised) incur a \$100 fee per change, charged to the program. Fees will be higher if provider change fees are higher. Change fees, when not paid directly to the provider, support OIE study abroad/away staff salaries not covered by state funding.
- No changes to the itinerary will be permitted after the deadline to recommend a Final Program Fee to the Liaison.

Exceptions

Where a change to the itinerary does not affect the budget AND does not require rescheduling with a provider or individual venue (for example, for venues included in a museum pass where the On-site Program Leader may visit the museums using a transportation pass or on foot on any day within the program schedule with no advance booking required), no fee is incurred and the change is allowable even after the deadline to recommend a Final Program Fee to the Liaison.

Where a change to the itinerary is necessitated by a health or safety concern, an unanticipated closing of the venue, or a mistake on the part of the program provider, no fee is incurred and the change is allowable even after the deadline to recommend a Final Program Fee to the Liaison.

Announcing a Program Fee

The OIE Program Manager proposes a program fee to the Liaison. Once approved, the OIE publishes the Full Estimated Cost of Participation, including the program fee, the estimated airfare and a list of additional participant expenses, in the program web guide. The OIE sends an email announcement to students who have started the application process. The Financial Aid Office uses the Full Estimated Cost of Participation to determine aid packages. At this point, students may begin applying for financial aid.

- Program Fee: money collected from each participant by UW Oshkosh. This typically, but not always, covers accommodation, transportation, site visits and other ground-related expenses.
- Estimated Airfare: airfare estimates include the contracted base airfare plus an estimate for taxes & fuel surcharges,

which remain subject to change by the airline until the FULL GROUP is ticketed.

- Full Estimated Cost of Participation: includes the program fee, estimated airfare, application fee, passport & passport photos, meals & transportation not included in the program fee, and personal spending estimate.

Prior to official fee publication, no one may announce or otherwise advertise a program fee. Units and individual staff may share a pre-approved Full Estimated Cost of Participation; everyone announcing the program or otherwise sharing information with students is required to use the same, pre-approved number. The OIE is able to pre-approve estimates based on prior years' programs, provided the itinerary remains consistent. For new programs or programs with significant changes, the Full Estimated Cost of Participation cannot be calculated until a finalized itinerary is available.

After official fee publication, Units and individual staff may 1) copy program fee details, including the full itemized list of expenses, all inclusions and all exclusions, from the OIE web guide exactly as they appear for publication elsewhere or 2) announce EITHER the Full Estimated Cost of Participation, as listed on the "Full Estimated Cost of Participation" line in the OIE web guide and without rounding down, OR both the Full Estimated Cost of Participation and the amount within this estimate that is paid to UW Oshkosh (the program fee).

Program Fee as it Appears in Your Web Guide - Sample

Estimated Charges on Your UW Oshkosh Student Account

- °\$3,420 ° UW Oshkosh Program Fee - will fall between \$3240-\$3420 based on 12-14 participants
- °\$0 ° UW Oshkosh Tuition
- °\$1,352 ° Airfare (taxes & fuel surcharge subject to change by airline until ticketed)
- °\$4,772 ° Total Estimated Charges on your UW Oshkosh student account

Additional Personal Expenses Estimated in US Dollars

- \$100 UW Oshkosh Application Fee (\$200 for out-of-state applicants)
- \$150 Passport & Pictures
- varies Immunizations (add to estimate if you need immunizations not covered by your insurance)
- \$250 Total Expense Estimate in US Dollars (plus immunizations)

Additional Personal Expenses Estimated in Foreign Currency (£ = Great British Pound)

- £150 Meals
- £0 Local Transportation (add to this estimate if you will use taxis)
- £135 Personal Spending Money (minimum!)
- £285 Total Estimated Expenses in Foreign Currency
- \$450 Total Foreign Currency Estimate Converted to US Dollars (current as of 10/20/11)*

\$5,472 Full Estimated Cost of Participation (plus immunizations)

End-of-Program Accounting

Participant Refunds

The OIE has been authorized to reinstitute participant refunds on a *pilot* basis, beginning with programs running in January of 2015, provided the following conditions are continuously met.

- No person shall imply, announce, guarantee or distribute refunds until after an account has been fully rectified by the OIE;
- OIE retains sole responsibility for determining and announcing refunds to program participants;
- No person shall distribute refunds in any manner other than via a refund, requested by the OIE, on the participant's UWO student account;
- OIE retains sole responsibility for distributing refunds;

- No person shall imply, announce, guarantee or distribute refunds to a participant who has not paid in full; and
- No person shall imply, announce, guarantee or distribute refunds to withdrawn applicants, unless the OIE determines that a line item surplus directly results from a withdrawn applicant's payment into that line item;

Disbursements to Participants or Others

It is important to remember that neither the program account nor the Travel Advance function as an open checking account for the program leader. All funds within the account and all funds allocated through a Travel Advance remain state funds and may only be disbursed, and must be accounted for, following state policy. Disbursements to program participants also follow state policy.

- Funds may not be disbursed to participants or to others by program leaders at any point prior to or after a program. Funds may be disbursed to participants during a program only after a policy review and pre-approval by the OIE. Approved disbursements must be specifically included in the program budget worksheet and must include a line item descriptor such as "10 lunches @ EURO 8 each".
- Funds disbursed to participants without pre-approval will not be reimbursed or calculated into the OIE Travel Expense Report. Any funds disbursed to participants from a Travel Advance without pre-approval must be reimbursed to the University.

Program Web Guide

I guess when you turn off the main road, you have to be prepared to see some funny houses.

Stephen King

The OIE creates an on-line guide, which we refer to as the Program Web Guide, for each individual program. When applicable, your program's Web Guide includes information on the courses, eligibility criteria and application process for your program; your flight information, itinerary, and bus departure/arrival times & locations from UW Oshkosh to the international airport; program fees & total cost of participation, payment deadlines, financial aid, how to make payments; accommodation and meals, and all orientation information. Information is added to the Web Guide as it becomes available.

All guides are accessible from uwosh.edu/oie/away/explore.

When applicants tell you they are confused, don't know what information to type into the application, don't know what application materials to submit, don't know anything about orientation, don't know when to pay fees, etc., please tell them to REVIEW THE GUIDE!

Marketing & Advising

Great designers seldom make great advertising men, because they get overcome by the beauty of the picture - and forget that

merchandise must be sold.

James Randolph Adams

Roles & Responsibilities

The specific roles and responsibilities of the OIE, the Unit, the Liaison, the On-site Program Leader and the On-site Program Co-leader are defined earlier in this guide. In general...

- The Liaison is responsible for overseeing unit-wide marketing and for recruiting enough students.
- The Unit, Liaison, On-site Program Leader &/or On-site Program Co-leader have shared responsibility in marketing the specific program to the appropriate audience and for advising and communicating with students on the academic content of the program, the itinerary, course selection, relevance to the student's program of study, pre-travel academic sessions, and other similar topics.
- The OIE markets study abroad/away in general and, for group programs, advises on the application process, program fees and total estimated spending, billing and payments, course registration, course overload, health & safety, special student admissions, disciplinary records and other similar topics.
- The Financial Aid Office advises on Financial Aid.

They don't just sign up!

Your students will require multiple touches over time before they make a decision.

The set of interested students will change over time.

Maybe they...

- don't see the value.
- can't communicate the value to others who may help them finance their experience.
- don't know that others find international travel to be of value.
- may not have ever imagined themselves abroad/away or been interested in travel.
- aren't likely to do something that doesn't lead to immediate tangible benefits.
- need clear incentives to participate.
- aren't interested today, but perhaps will be tomorrow...

A coordinated marketing effort AND both pro-active and responsive advising are essential to converting interest to applications.

Repetitive Marketing

Most effective – face-to-face interactions

- Championship or ownership of the study abroad/away cause by multiple professors
- On-site Program Leader & On-site Program Co-Leader interaction with students
- Professor interaction with students
- Student-to-student interaction with study abroad/away returnees
- UARC advisor, academic advisor, peer advisor or mentor interaction with students
- Study abroad/away fairs
- Recruitment meetings

Also effective – these compliment face-to-face initiatives

- Email – over time, create a list of dedicated followers; send regular emails
- Personal phone calls
- Brochures – distribute the OIE brochures by the 100's; have them at all face-to-face meetings

- Bulletin boards
- Reeve TV
- Blog
- Department or College Newsletter
- Department or College Publication
- LinkedIn
- Facebook
- Twitter
- SMS (if you have a work phone with this capability)
- AT ads (\$)
- Videos
- Presentations by community leaders about the career value in study abroad/away experiences
- Presentations by foreign students studying in the United States

NOTE: Do not *replace* your email list with social media! Social media users cannot be targeted, and social media isn't suited to "saving" for review later. It can be extremely difficult to find a post if too much time has lapsed. Use social networking to *compliment* your other marketing activities.

How?

If feasible...

- All Department instructors with an international experience **incorporate that experience into lectures & discussions.**
- All Department instructors **make announcements** in all of their classes.
- All Department instructors **invite** the program Liaison, On-site Program Leader, On-site Program Co-leader and/or returned study abroad/away students **to make a short presentation** in all of their classes.
- The program Liaison, On-site Program Leader, On-site Program Co-leader and/or returned study abroad/away students give a presentation at all relevant **student organization meetings.**
- The Department creates a **flyer** and posts these, following university policy on hanging flyers, especially in buildings where target students attend classes, eat, live, or hang out;
- The Department encourages all instructors to post the flyer or other relevant information on courses built in **D2L.**
- The program Liaison, On-site Program Leader, On-site Program Co-leader, and/or returned study abroad/away students organize and hold **information meetings** for prospective applicants.
- The Liaison **emails information directly** to prospective applicants.
- The Department reserves **display cases** in buildings around campus;
- The Department purchases advertisements in the **Advance Titan** or on **Titan TV** (advertising costs can also be added to the program fee prior to finalizing this fee); and
- The Department can update course descriptions in the **Undergraduate/Graduate Bulletin** to highlight courses that are offered both on campus and abroad/away.

When?

- Begin a MINIMUM of one full semester prior to the study abroad/away student application deadline.

Brochures

Just prior to the start of fall semester, the OIE will send you brochures which you can use when promoting your program. If at any point in the academic year you need additional brochures, just let us know. We can print as many brochures as you can hand out. If you need brochures in a hurry, we keep a small supply in a flyer rack in the hallway outside our office. Feel free to take as many of these as you need, and we'll replenish the supply when we see that's it's low.

Students prefer to search for programs by major or language. Therefore, all brochures are specific either to a particular major or a particular language. With 80+ programs, OIE isn't able to create program-specific brochures as well.

Study Abroad/Away Fair

The OIE runs two study abroad/away fairs each year with attendance generally at 500+ students in the fall and 350+ students in the spring. It is very important that all programs be represented, even if you think your program will fill – and even if it has already filled – this year.

- The fair attracts mainly Freshmen and Sophomores.
- Many students consistently attend 2-3 times prior to choosing a program or to choose multiple programs.

DO!

- Register for a table for the fair as soon as you receive the email invitation!
- Plan in advance for your participation by gathering information, pictures, and “stuff” to make your table look interesting and inviting.
- If you’d like a free-standing cardboard backdrop to decorate, please be sure to request one from the OIE at least several weeks in advance – or now! You can leave this on your table at the end of the fair; OIE staff will collect and store this. You can pick this up at any time throughout the year to use at other promotional events and to update it. Or, you can keep this in your office/department if you’d like.

Prospective Student Challenges

Clearly communicate the value of your program in relation to personal and academic growth and relevance to career (both near future and long-term). Provide your communication in writing so that prospective applicants can share this with family decision-makers.

- Balance Value with Fees
 - Be clear about the Total Estimated Expense; prospective applicants need to know how much they’ll need to earn, borrow and ask for before they can make an informed decision.
 - You may announce EITHER the Full Estimated Cost of Participation as listed in the OIE web guide OR both the Full Estimated Cost of Participation and the amount within this estimate that is paid to UW Oshkosh (the program fee). All announcements must include the full list of inclusions and exclusions.
 - Financial aid is available to students who have completed the FAFSA; for interim and summer programs the majority of students should expect loans.
 - Study abroad grants are available to students with a high level of financial need as demonstrated through the FAFSA, but these will cover only a small portion of the student’s expenses.
- Balance Value with Time
 - Many students are reluctant to spend even two weeks outside of the U.S. Others have jobs, internships, boy or girlfriends, spouses, kids, and others who are hard to leave behind.
 - Communicate any time saved by participating on your program. Will students be able to take a bottle-neck or pre-requisite course earlier, allowing them to take subsequent courses sooner? Will students meet degree requirements in a shorter time period than if they worked on those requirements at home? Will students be able to take more credits over the same amount of time than they would if they stayed in Oshkosh? Will students be able to graduate sooner?
- Balance Value with Lack of Family Support
 - Many prospective applicants’ parents actively dissuade or outright prohibit students from participating. Support these students as best you can, connect them to other support staff on campus as appropriate, and be sensitive to the fact that students who participate despite a lack of support may face additional struggles.

- Balance Value with Fear
 - Communicate positive cultural values that the host community embraces.
 - Communicate the level of fluency in a foreign language students realistically need to attain.
 - Communicate simple personal strategies for keeping healthy and safe (but don't provide guarantees or communicate anything except the reality of the environment as it compares to Oshkosh).

Advising Compliments Marketing

- Practice responsive, timely advising.
- Be accurate; don't share information before it is confirmed.
- Share the burden; forward questions to the OIE when appropriate.
- Be proactive; if one student asks, perhaps others have the same question. Use your email list to push information out to prospective participants on a regular basis.

Communication

Communicating with Students

The Program Liaison, On-site Program Leader and/or On-site Program Co-leader are responsible for direct communication with students in relation to:

- Academics
- Pre- and post-travel academic and program-specific meetings
- Course selection
- Day-by-day travel itinerary
- All other as outlined in "Roles and Responsibilities" above

The OIE is responsible for direct communication with students, often copied to the Program Liaison, On-site Program Leader and/or On-site Program Co-leader, in relation to:

- The application, application process, application paperwork
- Airline arrangements
- Personal deviations from the group itinerary
- Program fees, billing, payments, financial aid, and how to pay fees using scholarships and personal loans
- Course enrollment
- Mandatory OIE orientation
- All other as outlined in "Roles and Responsibilities" above

Program Eligibility

UW Oshkosh strives to be inclusive, offering the opportunity to participate in a High Impact experience to all students. For most programs, applications are accepted from students who meet the minimum eligibility requirements and seats are awarded on a first-come, first-served basis.

Eligibility requirements for students:

- Minimum cumulative G.P.A. of 2.0 (higher if the specific course offered through the program requires a higher cumulative GPA)
- Meets course prerequisites, including required courses taken prior to enrollment, GPA requirements, program admission requirements, instructor/department permission to enroll, etc.

- Graduate students must be in full standing.
- Relatively clean disciplinary record
- Applicants who indicate on their study abroad/away application that they are not able to participate in all pre- and post-travel academic sessions that are listed as “required” on the *Application to Offer a Group Study Away Program* will be considered to have not met the minimum eligibility requirements for the program. These students’ applications will be sent through the process for approving exceptions outlined below.
- Students who apply through the National Student Exchange (NSE) are awarded seats following the policies for UW Oshkosh students.
- Students from all other universities may apply, but preference in selecting applicants goes to UW Oshkosh and NSE students THROUGH THE STEPs I & II APPLICATION DEADLINE.
- Students who have been suspended may not apply until they have completed one semester of study at UW Oshkosh following suspension. Students who are suspended after applying to study abroad/away will be administratively withdrawn from their study abroad/away programs. Suspension does not take effect until after the 17-week term and, in some cases, may not affect summer enrollment.

Creating competitive programs; adding eligibility criteria:

- The Liaison may add or increase eligibility requirements.
- The Liaison may create a competitive program by tiering top applicants.
 - tiering must take place immediately following the STEPs I & II student application deadline;
 - the list of accepted applicants does not require ranking of individual accepted applicants;
 - the list of applicants assigned to the waitlist requires ranking;
 - a list of applicants not accepted into the program and not assigned to the waitlist must be forwarded to the OIE;
 - applicants with incomplete applications on the STEPs I & II application deadline may not be considered;
 - the Liaison must share the tiered list with the OIE prior to the STEP III application deadline;
 - the OIE will notify applicants following the standard OIE process;
- All eligibility requirements and criteria used for tiering must be clearly defined and approved in the *Application to Offer a Group Study Away Program* and must apply equally to all applicants.

Participation by applicants who are not students:

UW Oshkosh group programs may be open on a space available basis to applicants who are not students but who intend to participate fully in a program abroad/away.

- The Liaison to the OIE may, at the discretion of his/her department or college,
 - approve participation by applicants who are not students, such as UW employees who do not have an officially approved role on the program, spouses, partners and community members, on select programs.
 - require that applicants who are not students meet specific or broad eligibility criteria. These criteria must be clearly defined and approved in the *Application to Offer a Group Study Away Program* and must apply equally to all applicants who are not students.
 - determine whether applicants who are not students must, may, or may not enroll in the associated course/s. [Note: faculty and instructional academic staff may not enroll in a course offered by their own department.]

- Applicants who are not students apply following the same application process as applicants who are students.
- Applicants who are not students pay the same program fee as applicants who are students. As with student participants, no discounts or reductions are available to participants for missed program activities. No discounts or reductions are available to participants who are not enrolled for academic credit, regardless of the reason for non-enrollment.

Participation by individuals who have not applied to join a program:

Study abroad/away fees cover participation in program activities and access to services & space by Program Leaders, Program Co-Leaders, and applicants approved for participation through OIE. Fees may also cover involvement by other individuals whose function is clarified in OIE contracts or agreements.

From time to time unexpected opportunities may arise which will enhance the academic or cultural program for students. Program Leaders may take advantage of these by extending an invitation to an individual or group of individuals not covered by a contract or agreement to join one or more activities or give access to services & space.

Participation by spouses, partners, significant others or friends in program activities and access to services & space paid for by the University or by program participants requires advance approval by the UW Oshkosh campus unit responsible for such payments.

Participation by Dependents

As of January 2018, Program Leaders, Program Co-leaders and program participants may no longer apply to bring dependents on study abroad/away programs.

Exceptions

- The minimum GPA requirement for students can be waived by the liaison to the OIE, provided this requirement is waived for all student applicants with a similar application profile.
- Many (but not all) students with disciplinary records can be accepted into a program with approval by the Liaison AND a behavior contract.
- Course requirements may be waived only if Unit policies allow. The University Bulletin gives specific details on who is authorized to waive course pre-requisites (the College, the Department or the Instructor).

Process for Approving Exceptions

1. The applicant completes the study abroad/away application through STEP II.
2. During the OIE review process, any applicant who does not meet the eligibility requirements for the specific program is "flagged" for further review.
3. If the applicant is in danger of academic suspension, the OIE advises the applicant on a process which requires the student to work directly with a UARC advisor and a Financial Aid advisor.
4. If the applicant is not in danger of academic suspension, or if the applicant agrees to the terms and conditions of participation while in danger of academic suspension, the OIE emails you for your approval. You may decide to 1) approve the applicant, 2) approve the applicant for the waiting list, with the opportunity to participate if the program is not full on the application deadline, or 3) decline the applicant. You may not approve some applicants who do not meet the minimum requirements and not other similar applicants. In other words, if two applicants both have a GPA of 1.8 and nothing else about the application distinguishes one from the other, you must decline or approve both. However, if two applicants both have a GPA of 1.8 and one, for example, can provide a strong personal reference and the other cannot, you can approve one applicant and decline the other.

5. If the particular requirement that the student does not meet requires department consent, your department Chair will also need to approve any applicant that you have approved.

NOTE: This process is in place because a student who is suspended prior to a study abroad/away program *may* become ineligible to take the associated UW Oshkosh course, which also makes the student ineligible to participate in the program. Becoming ineligible to participate does not change the student's financial obligations. While technically a student who is placed on suspension can take an interim or summer course (so, technically, this shouldn't affect participation on programs offered over interim or summer), a student who faces suspension may not want to take out additional loans knowing that while on suspension the loans will come due.

Participant Application

To solve any problem, here are three questions to ask yourself: First, what could I do? Second, what could I read? And third, who could I ask?

Jim Rohn

Participant Application Process

If students ask what is due and when, please refer them back to the checklist in the web guide for your program. While most students successfully apply following Jim Rohn's advice, there are always some who ask multiple people first and read - never!

The study abroad/away application is a three-step process.

In STEPS I and II, the OIE collects materials which can be legally required prior to making a decision on participation.

- In STEP I: applicants complete an on-line study abroad/away application
- In STEP II: applicants print, read, sign and submit paper waiver forms, submit an unofficial transcript and pay an application fee at the cashier's office. Additional requirements as requested by the program Liaison may also be included in STEP II.

Following STEP II, the Dean of Students Office completes a disciplinary file check on each applicant. Applications are also sent to the program Liaison if the applicant does not meet minimum program requirements or if the program Liaison has requested to interview and/or pre-approve all applicants.

At this point, applicants may be:

- Conditionally Admitted to the program, pending completion of STEP III by the deadline.
- Waitlisted
- Declined

In STEP III, the OIE collects materials which cannot be legally required prior to making a decision on participation.

- In STEP III: applicants provide evidence that they have applied for or already have a passport and provide basic information on their medical and mental health history. Additional requirements as requested by the program Liaison may also be included in STEP III.

Your program's web guide includes full details on the application process and application requirements plus links to all application materials.

Application Process – Deadlines Applicable to On-site Program Leader & Program Co-leader

The OIE may need to collect original passports, visa applications, visa photos or other items as part of the application process. Program Leaders and Program Co-Leaders must submit all documents listed in the relevant Program Web Guide by the stated document submission deadlines.

Course Enrollment

Building Study Abroad/Away Courses in PeopleSoft

Class Start Dates

Your class start dates should be either the date on which your program departs the U.S. or, if you plan to teach during the days just preceding your program, your first class date. DO NOT use any pre-travel class session held during the semester prior to the study abroad/away experience as your start date.

Class End Dates

Your course END date may be either your program return date or the date on which the final assignment is due for the course, whichever is later.

- If you choose an end date that is EARLIER than the final date of the UW Oshkosh semester AND you want to submit your grades prior to the end of the semester, you must request early access to the grade roster from the Registrar's Office.
- If you choose an end date that is LATER than the final date of the UW Oshkosh semester, you will need to complete a form to extend the end date for each affected course beyond the normal semester end date. If you will have graduating seniors in a spring semester or spring interim course, remember that if your course ends after the official 17-week semester end date your seniors will need to change their graduation date to summer.

DO! If you need to extend your course end date, complete the form available from www.uwosh.edu/oie/staff/forms and send this to your Dean for approval at least a few weeks prior to the deadline for building courses in PeopleSoft. Your department secretary won't be able to set the correct course end date without this form!

Campus Deadlines for Building Courses in PeopleSoft

Your courses must be built as study abroad/away courses in PeopleSoft by the campus deadlines. Once built, other offices on campus must set credits and tuition to prepare these courses for enrollment.

- Fall Semester Courses 2nd Friday in March
- Fall Interim Courses 2nd Friday in July (of the year prior)
- Spring Semester Courses 1st Friday in October (of the year prior)
- Spring Break Courses 1st Friday in October (of the year prior)
- Spring Interim Courses 1st Friday of Spring Semester
- Summer Courses Last Friday in February

DO! Complete this form www.uwosh.edu/oie/staff/documents/coursepeoplesoft.pdf and submit this to the person in your unit who builds courses in PeopleSoft at least a few weeks prior to the campus deadlines for building courses. Without this form, your courses won't be built! If you've completed a form to extend your course end dates, be sure to let your

department secretary know. Your courses cannot be built until the course end dates have been approved.

Course Registration

Students are not able to enroll for a study abroad/away course on their own.

The OIE will send course enrollment requests to the Registrar's Office only for students who have completed study abroad/away applications AND received a seat on a study abroad/away program. Students may not be enrolled in a study abroad/away course without prior approval from the OIE.

Student Payments & Financial Aid

**A journey by Sea and Land, Five Hundred
Miles, is not undertaken without money.**

[Lewis Hallam](#)

Student payments may be made in cash, by check, by credit card (there is a fee for this), by financial aid, by scholarship and/or by external loan. Each student receives a billing statement from the OIE, after which the study abroad/away fees appear on each student's student account. It is then the student's responsibility to make payments according to the payment deadlines.

All fees must be paid at the Cashier's Office on the second floor of Dempsey. Students paying with financial aid must turn in a "Notice of Financial Aid Award for Study Abroad" form in lieu of actual payment BY THE PAYMENT DEADLINE.

Students may meet with a financial aid counselor prior to having published fees for a program to find out how much aid is available to them to study abroad/away. However, the Financial Aid Office cannot create an aid package or give students anything official until the full total estimated cost is available.

Student Orientation

I dislike feeling at home when I am abroad.

George Bernard Shaw

Orientation Options

UW Oshkosh and UW System both have policies and guidelines regarding student orientation. In compliance, and following best practice in the field, the OIE requires an on-line orientation followed by an orientation quiz and supplemented by an optional in-person orientation to which students may choose to invite family and/or friends.

- All program participants must complete the required on-line orientation. OIE has enjoyed 100% compliance since initiating the on-line orientation program.
- Orientation deadlines are firm. OIE has enjoyed over 99% compliance with completion of the on-line orientation by the stated deadline. It is imperative that participants complete by the deadline so that they have important information on health, safety and immunizations in time to prepare for their program abroad.
- On-site Program Leaders and On-site Program Co-leaders must complete the on-line participant orientation only prior to the first time that they personally accompany students on the particular program.
- Liaisons, On-site Program Leaders and On-site Program Co-leaders are always welcome to attend the in-person orientation, but are not required to do so.
- Orientation materials are available, from the time of program application, to all participants, participants' family, Liaisons, On-site Program Leaders and On-site Program Co-leaders through the web guide for the particular program.
- The in-person orientation date is listed in your program's web guide.

Orientation Inclusions

OIE orientation includes, when appropriate to the specific program,

- course registration & enrollment at UW Oshkosh and/or abroad/away
- residence hall contracts
- DPI requirements
- Dean's List & Honor Roll
- incompletes and graduation
- extensions to graduation deadlines
- airport transfers (from/to Oshkosh)
- group flights, individual flights and deviations
- arrival abroad/away
- UW Oshkosh interim & semester abroad/away (interim is not included in the tuition or fees paid to Oshkosh!)
- passports and airline ticket names
- ground itineraries (where to find; no program-specific details beyond the written itinerary)
- housing and meals (very general; often just a link to the accommodation provide web site)
- homestay (very general; few details)
- roommates
- emergency contacts (student contacts, UW Oshkosh contacts, partner contacts abroad/away, US State Dept)
- program withdrawal
- financial planning, including program fee, total estimated cost of participation, the amount of money to bring

abroad/away, how to bring money abroad (US dollars, foreign currency, ATM/debit cards, credit cards, plastic travelers checks, paper travelers checks, etc.)

- paying fees with financial aid
- program fee payment deadlines
- 1098-T (tax credit)
- international health insurance
- health: basic CDC guidance within the scope of OIE expertise (OIE does not recommend specific immunizations) and a direct link to country-specific CDC information; participants are directed to set up appointments at a travel clinic (per UWSA Policy 45 & guidance from the UW Oshkosh Student Health Center)
- prescription medications & travel
- personal security, including personal security strategies and risks by country and region
- code of conduct, alcohol & drugs, personal behavior that is not tolerated on study abroad/away programs
- essential documents, including passports, visas and country-specific laws in relation to carrying original documents on your person while in country
- packing basics, including where to find luggage limits, electricity, TSA and liquids
- customs, customs declaration forms, immigration and stating your purpose of entry, schengen immigration laws
- communicating with home
- cultural adjustment (VERY introductory; includes advice from past travelers)

Program-specific Orientation Developed by Liaison, On-site Program Leader, On-site Program Co-leader

Liaisons, On-site Program Leaders and On-site Program Co-leaders must also create and disseminate pre-travel orientation materials and pre-travel academic materials specific to their own programs. Also consider offering at least one in-person program-specific pre-travel meeting. Whether in person or through some other method, be sure to cover:

- the details of your airline travel itinerary;
- the details of your ground itinerary;
- details in relation to accommodation, meals, ATM locations, email access, etc.;
- local customs relevant to the experience;
- cultural differences relevant to the experience;
- legal differences relevant to the experience;
- your course syllabus, including evaluation criteria, academic expectations, behavioral expectations, attendance policy, dress code, etc. (if linked to the course grade);
- behavioral expectations, attendance policy, dress code, etc. not linked to the course grade, if relevant;
- your expectations of student use of “free time”;
- program-specific packing list;

You may also want to consider covering or providing information on:

- destination-specific gender/diversity issues, including male/female roles, norms for personal space, appropriate clothing, body language, independence; group or individual norms, minority students abroad/away, etc.
- context, including political and economic systems, historical events, current national concerns, human rights, population, health & welfare, state of technology, relations with the U.S., role of the military, political unrest and terrorism, crime patterns, law enforcement and laws, patterns of daily life, etc.
- cross-cultural issues, including cross-cultural communication
- culture-general issues (time, beliefs, relationship with nature/work/other people, values, etc.) and their effects on work & society
- culture shock
- knowledge of the U.S., including history and current events which relate to the host country

You may NOT

- advise or distribute information on immunizations: immunizations may only be recommended by a healthcare professional. You may provide a written copy of the CDC recommendations printed from the CDC web site (also already provided by OIE), but you may not make recommendations on any immunizations on or off the list or provide

further information;

- advise or distribute information on medications (over-the-counter or prescription). In the event that you believe students need information not provided by travel health clinics or you would like to help reiterate information shared with students during their travel health appointment, you must share your ideas with or submit your written materials to the OIE with a request to have the materials/information approved for dissemination. OIE will work with the UW Oshkosh student health center and/or with the local health clinic to ensure that information and materials are consistent and accurate.
- advise or distribute information that contradicts current personal security or risk abroad information in U.S. Department of State Country-specific information sheets, Travel Warnings, Travel Alerts, Warden messages, etc. If you disagree with the information or your personal experience is inconsistent with the information and you believe that students need information which contradicts current personal security or risk abroad information as made public by the U.S. Department of State, you must share your ideas with or submit your written materials to the OIE with a request to have the materials/information approved for dissemination. Per UW System policy, no UW System employee may guarantee or assure the safety of participants or imply that all risks have been eliminated from the study abroad environment.

Students expect that there will be at least one mandatory pre-travel academic session in order to become familiar with the syllabus and academic goals of the program, understand assignments related to the program, review expectations of students while participating on the program, and introduce students to basic cultural differences. Students appreciate the opportunity to meet one another before studying abroad/away and often have concerns or questions which would be best answered in a group environment.

Many On-site Program Leaders offer at least one Saturday morning session just prior to the OIE's family orientation, during which they answer questions from family members and give information to students which family members can help reinforce later on.

The OIE lists pre- and post-travel academic sessions in your program's web guide and requires students to list any conflicts with these dates on the study abroad/away application.

DO! Choose dates/times and arrange for meeting space for one or more pre-travel academic sessions and, if appropriate, post-travel academic sessions. List these on your *Application to Offer a Group Study Away Program*; as part of your academic curriculum, these dates/times are pre-approved and are considered part of the number of teaching hours offered through your program. It is your responsibility to communicate the orientation dates, times and locations which you have arranged, including any orientation offered just prior to or just after the OIE orientation, directly to your participants.

Program Leader Orientation

Required Attendance

All On-site Program Leaders and On-site Program Co-leaders are required to attend an OIE pre-travel orientation prior to each time that they lead a program. **This orientation SUPPLEMENTS the orientation designed for students.** None of the orientation information provided to students is repeated in this orientation. On-site Program Leaders and On-site Program Co-leaders are responsible for reviewing and understanding student orientation content.

Documents To Take with You

- Budget estimate worksheet
- Bus/Roommate List
- Student Medical Data & Passport List
- Vendor Contracts & Vouchers (if any)
- Bus Contracts (travel from Oshkosh to airport; if any)
- E-ticket copies (if applicable)
- Airline Ticket copies (if not using e-tickets)
- Copies of Visas (if applicable)
- OIE Travel Expense Report (or access electronic version from www.uwosh.edu/oie/staff/documents/ter.xls)
- UW System Travel Regulations (also available from <http://web.uwsa.edu/travel/login/>)
- Two Emergency Abroad Response Plans (carry paper copies with you)
 - Emergency Planning & Management
 - Mental Health Planning & Management
- Emergency Contact Cards (sufficient number of cards to distribute to students and leaders)
- Behavior Agreement (or access electronic version from www.uwosh.edu/oie/staff/forms)
- Participation in High Risk Activities form (or access electronic version from www.uwosh.edu/oie/staff/forms)
- Off-site Travel form (or access electronic version from www.uwosh.edu/oie/staff/forms)
- Incident Report Form (or access electronic version from www.uwosh.edu/oie/staff/forms)
- UW System Statement of Responsibility (www.uwosh.edu/oie/abroad/handbook/applicationpacketSTEP11.pdf)
- UW Oshkosh Statement of Responsibility (www.uwosh.edu/oie/abroad/handbook/applicationpacketSTEP11.pdf)

On-site Responsibilities

On-site Program Leaders & On-site Program Co-leaders are responsible for items as listed in “Roles & Responsibilities” earlier in this guide, plus program-specific roles & responsibilities.

Communicating with Campus

Email, call or text OIE:

- When you arrive;
- If any event occurs in-country or en-route that could potentially worry a parent (Feel free to keep it simple, for example, “There was a strike/hurricane/political event/etc. here/near here and all students are safe and accounted for.”);
- When called for by the emergency response plan.
- ABROAD@UWOSH.EDU WITH COPIES TO REINKEM@UWOSH.EDU & GRAFF@UWOSH.EDU
- +1-920-424-0775
- Text using emergency numbers from emergency plans

On-site Orientation

- You must provide an on-site orientation (required per UW System policy)

- Your orientation must include:
 - Handing out/discussion of wallet-size emergency cards
 - helping students write in emergency numbers on these cards (info avail from guide books)
 - in some countries the emergency numbers are different for land lines and mobile phones
- On-site orientation will be evaluated at the end of the program. Group Management Techniques

Give students a schedule, including daily activities, departure times & locations and activity locations. The more accurate the schedule is, the more likely students will be on time in the right place.

Spend time each day on daily briefings. Tell students of any schedule changes coming up and talk about activities which you have already done.

Ask students for feedback at the end of each activity or day to help students remain focused on program goals; this gives a good reason for everyone to come together at the end of the day.

If your group is large, organize teams so that it is easier to determine whether everyone is present.

Travel Advance, OIE Travel Expense Report (TER), and E-reimbursement – Process

1-2 Months Prior to Your Departure Date

- OIE will complete an electronic Travel Advance Request on your behalf.**
Amounts will be based on the budget for your program. You will be notified to approve the request electronically when it is ready. The Program Leader who submits the Travel Advance Request is accountable for tracking expenses and reimbursing the university for any amount not accounted for in their E-Reimbursement report.

10 Days Prior to Your Departure Date

- Travel Advance Received**
Check your personal bank account to ensure that the advance has deposited. If it has not deposited, contact Michelle Highley at 920-424-0837 or highleym@uwosh.edu. You will not receive a paper check.

On-site Program Leader

You will receive one advance via direct deposit that includes personal meals (at 100% of expected total reimbursement) and group expenses (at 100% of expected total reimbursement).

OR

On-site Program Co-leader

You will receive one advance via direct deposit that includes personal meals (at 100% of expected total reimbursement).

AND

The OIE International Financial Management Specialist will email you instructions on how to complete the E-reimbursement, with links to a YouTube video and an instructional pdf.

During Travel

- Record group expenditures using the new on-line E-reimbursement if you have internet access or using the OIE's paper (Excel) TER form if you don't have internet access. **DO NOT INCLUDE CELL PHONE OR DATA EXPENSES.**

E-Reimbursement (if you have internet access)

- Go to <https://uw.foxworldtravel.com/>
- Select "REIMBURSEMENT" from maroon menu area at top of page
- Select "E-Reimbursement Log In"
- Select EXPENSES module
- Select CREATE EXPENSE REPORT module

OR

If you already started an expense report and are re-logging in > Choose MY EXPENSE REPORTS

OIE Paper (Excel) TER (if you don't have internet access)

- uwosh.edu/oie/staff/documents/ter.xls

AND

- Record meals, cell phone and data expenses using the OIE's paper (Excel) TER form
 - uwosh.edu/oie/staff/documents/ter.xls

HINT: If you don't track your expenses using the on-line E-Reimbursement as you travel, and use the OIE's paper (Excel) TER form to track expenses instead, you can select an expense "type" from a dropdown list, making data entry into the on-line E-Reimbursement even easier for you later on.

Each Program Leader receives money to be spent for a specific purpose. This purpose is identified on the program budget worksheet and through your pre-travel briefing with the OIE Program Manager and is approved through the Travel Advance Request. When you receive a Travel Advance for a specific purpose, you must account for all expenses by submitting receipts for expenses related to that specific purpose. You may not submit receipts or expenses on your E-Reimbursement if money for those expenses was advanced to another member of your party.

The Program Leader who submits the Travel Advance Request is accountable for expending money as per the program budget worksheet, tracking expenses and reimbursing the university for any amount not accounted for on the OIE Travel Expense Report/E-Reimbursement. **Anyone who submits a Travel Advance Request and then gives the advance money to another individual to spend REMAINS ACCOUNTABLE FOR TRACKING EXPENSES AND PERSONALLY REIMBURSING THE UNIVERSITY FOR ANY AMOUNT NOT ACCOUNTED FOR.** The Program Leader who submits the Travel Advance Request for specific expenses MUST submit receipts and expenses on his/her own E-Reimbursement; these may not be submitted with anyone else's Travel Expense Report.

Contact Michelle Highley at 424-0837 or highlevm@uwosh.edu if you have further questions on how to complete your E-Reimbursement.

Within 21 Days of your Program End Date

- Complete your entries for all **group** expenditures in the on-line E-reimbursement (DO NOT SUBMIT; DO NOT INCLUDE CELL PHONE OR DATA EXPENSES).

AND

- Notify OIE to request review of your E-Reimbursement Group Expenses (DO NOT SUBMIT).

AND

- Email or hand deliver the OIE's paper (Excel) TER form to the OIE International Financial Management Specialist to account for **personal meals and cell phone/data expenses**. The OIE International Financial Management Specialist will enter these into your E-Reimbursement for you.

Within 30 Days of your Program End Date

- Respond to an OIE Request to Submit your E-Reimbursement AFTER OIE Review

The OIE International Financial Management Specialist will review your expenses, calculate currency exchanges for you following UW policy, calculate the balance owed either to you or to the OIE, and use a "notify traveler" function in the E-reimbursement to let you know that your E-reimbursement is ready for you to log in and submit.

You may be asked for additional information, or you may be asked to confirm revisions. **Be sure to respond in a timely manner!** (You forfeit all of the money you have already received in a travel advance PLUS any amount owed to you if

this entire process is not completed within 90 days of your program's official end date!)

If you haven't already uploaded all of your receipts and documentation into the E-reimbursement system, the OIE International Financial Management Specialist will email you a single pdf that includes your Travel Advance documentation, program budget and receipts. This will be the documentation you need to upload with your E-Reimbursement. It is preferable, though not required, that you upload receipts as you travel.

Re-pay any balance owed to the University

Make your check payable to "UW Oshkosh" and submit this to the OIE.

Within 15 business days of receipt of your completed E-Reimbursement

Any reimbursement due to you will be paid by direct deposit.

You will receive an email notification when your direct deposit has processed. To identify your reimbursement on your bank statement, look for "UWOSH" and "Electronic Deposit" or "Electronic Withdrawal" or "WEB Authorized Payment".

Deposits are made to the same bank account used for your payroll check. If you have multiple accounts set up for payroll deposits, your reimbursement will be deposited into the "net pay" account in the Human Resources System (HRS). If there is no "net pay" account, your reimbursement will be deposited in the first account. If you have questions about your deposit account and/or you need to make changes to your deposit accounts, contact Human Resources at (424-1166) or use this form <http://uwservice.wisc.edu/docs/forms/pay-direct-deposit.pdf>.

Within 90 Days of your Program End Date

If this entire process (except deposit of funds into your account) is not completed within 90 days of your program's official end date, you must pay back all of the money you have already received in a travel advance and you won't receive a reimbursement for any amount owed to you! In addition, your paycheck will be held until the travel advance has been accounted for.

Reimbursable Expenses (examples related to Leading a Group Program)

Expenses listed below are reimbursable **ONLY IF** included as a budget item in the program fee that students pay to the OIE. Exceptions may be made on a case-by-case basis, provided items are pre-approved by the OIE International Financial Management Specialist or the Program Manager and are permitted by policy, and provided there are sufficient funds in the program budget to cover the expense.

CASH WITHDRAWALS AND MONEY EXCHANGE

- UWSA Currency Exchange policy requires that expenses paid in foreign currencies be reimbursed to the employee using rates documented by the selling entity. In the absence of such exchange receipt documentation, the inter-bank rate from the on-line OANDA site must be used. **You aren't a bank, and you don't get the interbank rate when you exchange money, so it is in your best financial interest to keep money exchange receipts and file them with your E-Reimbursement. You cannot be reimbursed for fees associated with your money exchange without the receipt.**
- When possible, withdraw cash from bank-run ATMs located just outside that bank. Ideally use them during the bank's opening hours; if your card is munched by the machine, you can go inside for help. Bank ATMs usually do not charge usage fees and are generally [more secure](#), as a thief is less likely to target a cash machine near surveillance cameras. Many European banks place their ATMs in a small entry lobby, which protects users from snoopers and bad weather. To get in, look for a credit-card-size slot next to the door and insert your card.
- **Avoid "independent" ATMs, such as Travelex, Euronet, Moneybox, Cardpoint, and Cashzone.** These have high fees and may use ["dynamic currency conversion"](#), which generally means that they charge fees without disclosing them to users in advance. "Independent" ATMs are often found next to bank ATMs, so read signage on the machines carefully.

CONTINGENCY FUND

- Each group program will have a funding line item for contingencies. Contingencies are unexpected, emergency expenses that come up from time to time while traveling. For example, an unexpected taxi fare associated with bringing a program participant to a clinic or an unanticipated train fare to remove participants from an insecure or dangerous environment.
- Program leaders may choose to spend contingency money on non-budgeted line items **WITH PRE-APPROVAL FROM THE OIE** and according to the policy outlined in this guide. However, **program leaders who spend contingency money on non-emergency activities and then later encounter an emergency will become personally financially liable for all non-emergency contingency spending that cannot be supported by the program budget.**

INDIVIDUAL MEALS

- Claims for meals shall represent actual, reasonable and necessary expenses.
- Meal claims must be structured on a "per meal" basis for the actual amount spent.
- Tips are limited to 15%.
- Meals already included by a partner abroad or included in the cost of conference registrations or lodging (like breakfasts) are not separately reimbursable and are not to be included in this calculation.
- Expenditures for alcoholic beverages are not reimbursable and should not appear on receipts.

HOSTED MEALS

- Hosted meals are those meals that are provided for someone other than yourself.
- Budgeted hosted meals **require an itemized receipt** AND documentation on the OIE TER of the name of the individual(s), the reason for holding the meeting over a meal period, and/or the reason for covering the individual's meal
- NOTE: Limits per person for **hosted meals** are a set amount for all international locations, often different than the per meal amount listed on the bottom of your budget which is based on a specific location for a personal meal. The policy for hosted meals can be found at: <https://www.wisconsin.edu/uw-policies/uw-system-administrative-policies/headquarter-city-uw-system-sponsored-events-policy/>

INDIVIDUALLY-TICKETED VENUES OR EVENTS

- At times, the only receipt for an expense may be individual tickets distributed to program participants for entry into a venue or event. Sometimes it's difficult to get all tickets back from the participants, and at other times participants would like to keep these as souvenirs. In lieu of a receipt, take a digital photo of all of the tickets together (for example, fanned out so that it's possible to see the fee paid on each one, or a ticket number), or of each ticket, and submit this digitally to the OIE with your travel expense report.

PHONE & DATA

- OIE will reimburse for phone & data only up to the amount in your budget, which will not exceed the total allowable through UW System Travel Policy (Meals & Incidentals maximums). "Incidentals" include use of phone & data for business purposes.
- Download a VOIP or messaging app to connect with your student group and make advance calls to confirm reservations while in WiFi zones, if at all possible.
- Student fees cannot be used to cover personal calls.
- Contact your cell phone provider to make sure you understand how you will be billed while abroad. **Verizon and AT&T have changed their international plans to \$10/day.**
- **Cellhire** is a great option for renting a phone and a SIM card to use overseas.
- You may need to purchase of a SIM card to use with your phone or with a (very old) OIE loaner phone.

PROMOTIONAL ITEMS

- Promotional Items may be budgeted on your program spreadsheet. When buying Promotional Items, be sure to use the UW System Sales and Use Tax Exemption Certificate (visit Purchasing in Administrative Services if you do not have a card). This will allow you to buy the Promotional Items sales tax free. If you forget the certificate and are charged sales tax, you will not be reimbursed for the sales tax you were charged.
- If you buy Promotional Items for your program at the University Bookstore you are eligible to receive a 20% discount. To get the discount, you must contact the OIE International Financial Management Specialist **920/424-2344 AT**

LEAST ONE WEEK prior to going to the bookstore to purchase the Promotional Items. The accountant needs time to set up their point of sale system to reflect your account number and discount.

STUDENT ADVANCES

- The On-site Program Leader may lend money to a student who is without money. The student must agree, in writing, to have the US dollar equivalent charged to his/her student account. The On-site Program Leader must include this written agreement with the receipts for the travel advance.
- The On-site Program Leader may give a pre-determined amount of cash to all participants of the program, provided this is related to a specific pre-approved expense and is listed on the program budget worksheet as an advance to program participants. Per UW policy, the On-Site Program Leader must provide a signature sheet which includes the specific purpose of the money and signature lines for all program participants. Students must sign at the time that they accept the money. The On-site Program Leader must include this signature sheet with the receipts for the travel advance.

TAXI

- Tips: maximum of 15% of the taxi fare

OTHER

- Laundry services
- Tips and gratuities for hotel employees: \$2.00/day maximum
- Porter/Skycap tips: \$1.00/bag maximum

CLAIMS THAT ALWAYS REQUIRE RECEIPTS

- Original, itemized receipts are required based upon the expense types and dollar limits listed below. Credit card **statements alone do not meet receipt requirements.**
 - ATM/traveler's check/currency exchange service charges in connection with official travel; \$0 on up.
 - Taxi or subway pass if over \$25.
 - Hosted Meals (including students/guests; see above for additional documentation requirements).
 - Lodging (original itemized receipt).
 - Train/bus for intercity travel only.
 - Internet use if over \$25
 - Any claims in excess of \$25.00 total (not "per person"). Include a complete description of the expense.

NOTE: The I.R.S. recommends that business travelers keep receipts for personal tax filing purposes. There has been one instance of a program leader's personal tax statements being audited in relation to program-related spending.

DEFINITION OF ORIGINAL RECEIPT:

An original receipt is a written acknowledgement that the vendor has been paid for providing goods or services. To be considered original it must show:

- The name & address of the vendor providing the goods or services
- The date that the specific services were received or items were purchased
- Itemization of the services and/or goods and pricing
- Final amount due and evidence that it was paid

For tips and other low expense items, an original written acknowledgement provided by a named payee that confirms payment has been received for a stated purchase is acceptable.

Scanned receipts are accepted as originals providing they meet the same requirements for paper receipts. Keep in mind that if you're planning to scan your receipts or other required documentation, the scan must be clear, legible and saved in a format that allows opening and printing.

Expenses Not Reimbursable (examples related to Leading a Group Program)

When accepting a travel advance, every penny of the Advance is associated with a pre-approved expenditure as listed in the “Travel Advance” section of the budget spreadsheet for your program. Any expenditure that has not been pre-approved is Not Reimbursable. (See “Reimbursable Expenses” above for exceptions.)

- Expenses that are not incurred following university, UW and State Department of Administration policy. **It is in your best interest to have all expenditures pre-approved by the OIE.**
- Expenses that are not program-related.
- Expenses for activities to which not everyone in your group was invited, except in emergency (e.g. taxi to the hospital).
- Air penalties or fees for
 - cancellations and changes for the convenience of the traveler
 - economy plus, economy comfort, business, or first-class seat assignments
 - flight/trip insurance (except as provided in the program budget for purchase of the UW-negotiated policy)
 - memberships in travel/airline clubs and/or daily club use
 - personal travel or offered side trips taken in conjunction with business travel
 - priority boarding
 - travel companions
- Alcoholic beverages
- Expenses or supplier-assessed penalties incurred as a result of voluntary cancellation of travel reservations (air, car, hotel, etc.), unless pre-approved as an exception.
- Charges incurred for late lodging checkout, unless pre-planned and included in the program budget
- Copies made off campus
- Cost of participation or attendance for any person not on the official program roster, unless approved through the program budget
- Developing of personal pictures
- Expenses for social events or non-business related activities, such as sightseeing tours, sport outings, excursions, etc.
- Expenses not filed within 90 days of the official program end date
- Expenses paid or reimbursed from outside sources
- Expenses that are not UW business related
- Extra baggage charges for personal items.
- Flowers
- Gifts
- Greeting cards
- Insurance: flight, travel or property insurance to cover your belongings
- Late payment penalties and interest on corporate card
- Lost/stolen cash or personal property
- Meals included in the cost of airfare, registration fees, lodging, etc. or included in the fees paid to a program coordinator
- Nonbusiness-related telephone calls.
- Parking costs at the assigned headquarters
- Passports
- Pay for view movies in hotel/motel room
- Permanent Property
- Personal entertainment
- Personal items and services, e.g., toiletries, luggage, clothes, haircuts, etc.
- Personal items, such as toiletries, adapters, clothing, or luggage
- Printer supplies, including ink and paper
- Traffic citations, parking tickets and other fines
- **Any/all claims that exceed the budget for your program.**

Health Insurance

Cultural Insurance Services International (CISI) –for students and On-site Program Leader/Co-leader
<http://www.uwosh.edu/oie/abroad/handbook/insurance.php>

Workman's Compensation for State employees (work-related vs. non-work-related illness or injury)

Risk & Crisis Management

Provide clear, written statements related to responsibility of participants, level of supervision provided (including general statements related to when supervision will not be provided), etc.

Monitor the local environment and your participants for health & safety issues; follow the Emergency Planning & Management document or Mental Health Planning & Management document

Take responsibility for responding appropriately to student concerns and to concerning student behavior.

The Student Discipline code, the OIE's written statements of responsibility (signed by all program participants) and any written codes of conduct provided by individual On-site Program Leaders apply to students while on study abroad programs; these also provide guidance for On-site Program Leaders when determining the limits of appropriate student behavior and what their obligations are in relation to student conduct.

Balance the need to take advantage of opportunities as they arise with the Institution's responsibility to properly advise students of risk.

Your travel itinerary includes activities and events that have been reviewed by OIE against the OIE Risk Management Plan. You may not add activities or events that may be considered high risk or that must be vetted for proper business license and general liability insurance coverage without prior approval from OIE. VETTING TAKES TIME AND MAY NOT BE FEASIBLE IN THE TIME FRAME OF A SHORT-TERM PROGRAM. High risk activities, and activities that must be vetted for proper business license and general liability insurance coverage, include, but are not limited to, such things as:

- abseiling (a form of mountaineering)
- activities considered illegal in the host country
- air rifle shooting
- amateur or interscholastic athletics
- assault courses
- bungee jumping
- caving
- climbing walls
- coastering (involves activity along rocky coastline)
- driving (includes all motorized vehicles)
- flying as a pilot or passenger in non-commercial aircraft
- hang gliding
- high rope courses
- kite buggying (vehicle powered by a kite)
- land sailing or land yachting
- mountain biking
- mountain boarding
- mountaineering
- night lining
- orienteering (the sport)
- parachuting
- parasailing
- pot holing (exploring of natural pot holes)
- racing by horse or motor vehicle
- rappelling
- rock climbing
- sky diving
- top rope climbing
- transportation by non-commercial means
- tyrolean traversing (crossing by rope while hanging by hand or by cable attached to your body)
- zip-lining
- travel by water, or activities in water, including:
 - bell boating
 - boat tours
 - boating
 - canoeing
 - canyoning
 - ferries
 - ghyll scrambling (climbing up/sliding down waterfalls)
 - power kiting
 - rafting
 - sailing
 - scuba diving
 - snorkeling
 - surfing
 - swimming (except manmade pools)

- gorge walking (climbing a waterfall, for example)
 - jumping or sliding into pools of water (except manmade pools)
 - kayaking
 - water skiing
 - whitewater rafting (all levels)
 - wind surfing
- There are two plans (both at www.uwosh.edu/oie/staff/plans)
 - Emergency Planning & Management
 - Mental Health Planning & Management
 - In the case of an incident, Program Leaders follow the “ Emergency Planning & Management” plan or the “Mental Health Planning & Management” plan for action items and reporting.
 - In the case of an incident where students may need to individually report what they witnessed or what they know, encourage the student to use the “Incident Report Form” available from www.uwosh.edu/oie/staff/forms . If the student would prefer to report the incident in another way, or does not formally report the incident, information about the incident can be reported to OIE without the form.
 - Read the emergency contact information listed in your program’s orientation carefully; review for mistakes in phone numbers, email addresses, physical addresses, etc.
 - Confidentiality: as an employee of UW Oshkosh, you CANNOT guarantee a student’s confidentiality. You may need to share information given to you with other campus offices.

CDC, Medications & Immunizations

DO NOT PURCHASE, RECOMMEND, OR SHARE OVER-THE-COUNTER OR PRESCRIPTION MEDICATIONS WITH OR FOR PROGRAM PARTICIPANTS.

- You may, however, share that you HAVE followed the advice of your own health provider. For example: Participant A asks his program leader whether he really needs to get the Hepatitis A vaccination prior to travel. It is, after all, expensive. You may indicate that you received the same recommendation and followed it. You may also encourage him to follow the recommendation that he has been given.
- You may help participants purchase medications by, for example, accompanying the participant to a pharmacy or translating as the participant speaks to a pharmacist, as long as you do not give recommendations. Work directly with a pharmacist, with you acting as interpreter, if necessary. The pharmacist will know what questions to ask and can give a proper recommendation.

DO NOT DISCOURAGE PROGRAM PARTICIPANTS FROM TAKING MEDICATIONS RECOMMENDED OR PRESCRIBED BY A HEALTH PROFESSIONAL OR FROM FOLLOWING A PRESCRIBED TREATMENT PLAN.

- For example: Participant A asks his program leader whether he really needs to get the Hepatitis A vaccination prior to travel. It is, after all, expensive. You have personally decided against getting the immunization. You may indicate that you were given the same recommendation by your health provider. You should indicate that it’s important to make medical decisions based on discussions with a health provider and, if appropriate, with parents or spouses and that it would therefore not be appropriate for you to share your decision.

Slides below are from Student Orientation; the PowerPoint presentation includes audio.

Center for Disease Control (CDC)

Visit your healthcare provider, the student health center (424-2424) or a travel health clinic 6 weeks prior to travel to discuss immunizations.

What does my doctor need to know?

- Your travel dates
- The countries you will visit
- The specific cities, states, departments, etc. within each country that you may visit

ALL travelers need:

- Routine childhood vaccinations
- Hepatitis B
- Tetanus-Diphtheria booster

Review the CDC document in your print orientation materials for additional recommendations on:

- Hepatitis A -- Typhoid
- Yellow Fever -- Anti-Malarials
- **REQUIRED** (Kenya, Tanzania)

cdc.gov

What can I find on the CDC site?

Look for a list of immunizations which are **RECOMMENDED** before travel or **REQUIRED** to enter a foreign country

Look for further information on, and important precautions to take against, Hepatitis A Typhoid Yellow Fever Diarrhea Malaria Outbreaks

Diseases from food and water are the leading cause of illness in travelers.

- **Wash your hands** often with soap and water, especially before eating. If soap and water are not available, use an alcohol-based hand gel (with at least 60% alcohol).
- Check the CDC site to **find out** whether you should drink only bottled or boiled water, or carbonated (bubbly) drinks in cans or bottles and **whether you should avoid tap water, fountain drinks, and ice cubes**.
- Do not eat food purchased from **street vendors**.
- Make sure food is **fully cooked**.
- Avoid **dairy products** unless you know they have been pasteurized.
- Diseases from food and water often cause vomiting and diarrhea. **Bring diarrhea medicine** with you so that you can treat mild cases yourself!

Traveling to a place with a risk of any of the above?

Travelers who become ill with a fever or flu-like illness **while traveling and up to one year after returning home** should seek prompt medical attention and tell the physician their travel history and what medications they have been/were taking.

Rights, Responsibilities & Personal Liability

The University, its employees, agents and representatives have certain legal responsibilities, including the obligation to exercise **reasonable care** in the performance of all their official duties.

The On-site Program Leader and On-site Program Co-leader's official duties are determined partially by the purpose or location of a specific program; verbal and written representations made about the program and the responsibilities of the On-site Program Leader by the OIE, through the Liaison and Program Leaders themselves, through the department, etc.; group size; age of participants; verbal/written agreements with students on student responsibilities, etc.

UW System General Counsel advises that UW employees not talk to lawyers directly. Always direct any lawyer who contacts you to:

Ms. Anne E. Bilder, Senior System Legal Counsel
 Phone: 608 265-3094
 Fax: 608 263-3487
abilder@uwsa.edu
 1850 Van Hise Hall
 1220 Linden Drive
 Madison, WI 53706

UW Employees who exercise reasonable care are entitled to representation by the General Consul office in Madison.

It's your reputation! Protect it!!

I announced in classes that "I will accompany the group" and that there will be "time for students to enjoy the local night-life."

I do not give participants information on where my supervisory responsibilities end. I do not accompany students to the local bar. A female student leaves the bar intoxicated, makes poor decisions related to her personal safety, and is held up in an alley.

I accompany the group to the local bar to enjoy the local night-life. One student is a recovering alcoholic, bends to "peer pressure" and drinks anyway. Upon return home, parents accuse the On-site Program Leader of being involved in "pressuring" the student to drink by organizing a university event at a bar.

The University of Wisconsin System and UWO **prohibit the unlawful possession, use, distribution, manufacture, or dispensing of illicit drugs and alcohol** by students and employees on University property or as part of University activities. Neither the University of Wisconsin System nor the University of Wisconsin Oshkosh say whose laws you should be following. Your students may be of age in the country you are visiting, but what if they aren't of age in the U.S.?

DO NOT DRINK WITH YOUR STUDENTS, EVEN IF THEY ARE OF LEGAL DRINKING AGE IN THE U.S. OR IN THE HOST COUNTRY. A few parents have complained about professors drinking with and buying drinks for students. One student showed a picture of a professor drinking with students while "mentioning" that he didn't receive a fair grade in

the course. Others have reported that individual On-site Program Leaders drink with students in hotel rooms or in other inappropriate places. Some students do not find this type of behavior appropriate and express shock and disappointment.

Thank-you's

Requests for promotional items (items with the UWO wordmark or name on them) to be used as "thank-you's" can be made through the University Bookstore. Request either the 'donation request form' or a discount for the purposes of marketing UW Oshkosh to prospective students.

Post-travel Evaluation

The OIE will send out evaluations related to the OIE's role in your program. We will NOT evaluate the academic portion of the trip. This can be done separately by individual instructors if desired.

Post-program Re-entry and Assessment

A man travels the world in search of what he needs and returns home to find it.

George Edward Moore

DO! Complete the international program abroad/away cycle by offering your students a forum through which they can readjust to U.S. culture, reflect on their experiences, and then incorporate those experiences into academic and career plans and coursework in the future. You could do this by organizing a series of formal or informal meetings, offering a post-study abroad/away course which deals with these issues and others, or working with students who put together occasional activities or events for students interested in international issues.

DO! The OIE will ask you to distribute and collect student evaluations at the end of your program abroad/away, but these evaluations will not focus specifically on the academic content of the program. If you would like to complete a course evaluation, you may disseminate it on your own. There is no obligation to share this with the OIE.