## Introduction/Overview

Welcome to the overview video for the Santa Clara University International Travel Proposal Process. This is a required component for anyone who will be filling out the Proposal. It is meant to be a helpful guide for ensuring that your Proposal addresses all of the required components in a thorough and complete manner so that the Travel Policy Advisory Committee, also known as TPAC, is able to easily assess your Program without needing further information and clarification.

Thank you for your service in helping students and other SCU affiliates travel abroad. We, as TPAC, are here for you and are happy to answer your questions and provide guidance.

If you are a faculty or staff member who will be traveling alone, then you do not need to fill out this Proposal. There is a separate online form that can be found on the Global Engagement website.

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Let's start by defining what is University Sponsored Travel.
- University Sponsored Travel includes but is not limited to credit-bearing and non-credit bearing experiences such as: study abroad programs, internships, field studies, service learning, research, volunteer or work programs, fellowships, or professional development activities sponsored or endorsed by the University. The opportunities are organized, developed, or administered by specific colleges, departments, or Santa Clara University employees as approved by the Associate Provost for International Programs, TPAC, and the Provost for Academic Affairs.

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- University Sponsored Travel participants include but are not limited to undergraduate students, graduate students, faculty, staff, alumni, the public, and agents or affiliates of the University.

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- Individual travel that has no formal affiliation with SCU, is not monitored by the university and does not require an International Travel Proposal is NOT University Sponsored travel. This includes vacations and any programs or internships abroad that students or affiliates may pursue independently, outside of SCU.

Any travel for the University that encompasses one of the areas just mentioned, except for individual faculty or staff university-sponsored travel, must fill out a Proposal.

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**Travel Policy Advisory Committee (TPAC)**
As mentioned, TPAC is the group that will review your Proposal. TPAC members come from across campus from academic departments and centers. They typically handle international program management for their area. These areas represented include: College of Arts & Sciences, School of Business, School of Engineering, School of Law, the Miller Center for Social Entrepreneurship, the Ignatian Center for Jesuit Education, the Center for Student Leadership, Global Engagement, and Risk Management. This group reviews over 60 Proposals every year.

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**University International Travel Policy**
Santa Clara University's international travel policy gives primary considerations to Travel Advisories issued by the US Department of State, in addition to considering other sources. Santa Clara University does not support travel to countries that have a DOS Travel Advisory Level 3 or 4, unless the Provost grants an exception to university policy.

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**U.S. Department of State (DOS) Travel Advisory Levels**
The U.S. Department of State has 4 travel advisory levels:

**1** Exercise normal precautions
**2** Exercise increased caution
**3** Reconsider travel
**4** Do not travel

Level 1 - Exercise normal precautions, Level 2 - Exercise increased caution, Level 3 - Reconsider travel, Level 4 - Do not travel

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The Associate Provost for International Programs and TPAC review the applications for each International Travel Proposal for countries with a DOS Level 1 and Level 2 rating. [Next Slide 9] For Level 3 and 4 countries,the Travel Policy Advisory Committee makes a recommendation to the Provost regarding the possibility of granting an exception. In this case, more information needs to be provided within your Proposal that takes a deeper look at the concerns raised by DOS. TPAC reviews the information presented and makes a recommendation to the Provost. If an exception to the University International Travel Policy has been approved, it is a one-time exception and does not apply to possible future program Proposals.

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**Getting Started**

Before you start your Proposal, it is best to start at the Global Engagement Website.

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On the main page of the Global Engagement Website, click on the International Travel for Faculty/Staff link and begin perusing the topics.

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The topics include
- What is the University International Travel Policy?
- What is University Sponsored Travel?
- Policies and Procedures
- Program Coordinator Responsibilities and Resources
- Diversity and Identity Abroad, and
- Roles and Responsibilities

It is important that you understand the responsibilities that you will be held accountable for as the Program Coordinator for both individual participant and group travel. These include 24/7 emergency response while your program is abroad and crisis management in the event of individual participant situations or high level emergencies. If you do not feel comfortable in this role, or if your department does not have the resources or infrastructure in place to provide 24-7 crisis response and support, then it is best to discuss your concerns with your supervisor to see if a different Program Coordinator can be found.

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**The Basics**

Proposals are due no later than 8 weeks before your expected travel date. However, early proposals are strongly encouraged. If it is a newly proposed program, it is highly recommended that you begin preparations for your travel as soon as possible so that you can have a complete Proposal well in advance of your proposed travel. Proposals submitted after 8 weeks will need to ask for an exception to Committee policy and provide an explanation as to why it was not submitted before 8 weeks. It should not be expected that late proposals will be reviewed.

A Proposal includes a thorough review of Country Specific DOS Travel Information including addressing DOS Risk Indicators in detail, and Center for Disease Control recommendations. It also includes knowing your itinerary, including your lodging and transportation. Insurance information for private transportation modes will need to be included with your Proposal. A more thorough discussion of these areas will take place later.

**<u>The Proposal</u>**

To access the Proposal, please go to SCU.edu/GEO.  Click on International Travel for Faculty/Staff and then click on the Application for Faculty/Staff Program Coordinators. The link for the application is available on this page. You will need to login with your SCU ID in order to access the application.

**<u>Section 1: Program Coordinator Information</u>**

This section is fairly straightforward. Here you will verify your information and better define your role for the program. For example, will you be traveling with the group or individual, or will you be the on-campus coordinator. This is a great area to let your experience shine through, especially if you have specific experience in that country or speak the language.

**<u>Section 2: Program Coordinator Role and Responsibilities</u>**

In this section you will verify that you understand and will take responsibility for some very important aspects of the proposed travel.

These include:

- Preparing and presenting a pre-departure orientation
- Advising participants about health and safety abroad including necessary immunizations and medications
- Registering participants with the US Embassy via the Smart Traveler Enrollment Program (STEP)
- Advising on travel visas
- Advising on passports and expiration dates

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This section also asks you to upload the Department of State Travel Advisory and the Center for Disease Control Traveler's Health section. With the DOS Travel Country Information, make sure that you go beyond the travel advisory to the country specific information. It is necessary to expand all of the boxes and review the information thoroughly on this page.

The DOS Travel Advisory includes helpful information that will be pulled upon later in the application so please read it thoroughly. The same is true for the CDC Traveler's Health Report.

Depending on what type of program you have - short-term vs. long term - you as the program coordinator may face increased responsibility. You may be surprised to know that short-term programs can carry more risk because there is less time for preparation and integration into the local community.

The type of participants you have - undergraduates, graduates, friends of the university - may also affect the responsibility placed on the program coordinator.

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Your role as the program coordinator should be taken very seriously. You should be prepared to respond to a variety of cases including lost passports, theft, sexual assaults, natural disasters and beyond. It is expected that you will be on call 24/7 while the program is taking place to handle any emergencies that do occur. This includes not only undergraduate study abroad programs but also graduate study abroad

programs, individual participant experiences, for instance fellowships or externships, group immersions, alumni travel, etc. By filling out the Proposal you are establishing yourself as the point person.

Please take time to consider your experience managing and potential response to the following critical incidents on a global program.

**Section 3: Program Overview**

In the Program Overview you will provide a sense of what the program will consist of and who will be participating.

The DOS Travel Levels and Risk Indicators will come back into play here. It is important that you understand what the risk level is and address how this will affect your movement and interaction with the country in your Proposal. When you are putting together the itinerary it is important to think about if you would send your own child or niece or nephew on this program. If you would not, then more research and preparation needs to be done.

**Section 4: In-Country Contacts or Organizations**

This section focuses on the contacts that you have in the country that you are proposing to travel to. When creating any program, the in-country contacts are a great resource, particularly if participants will be traveling on their own, away from an SCU representative. This contact or organization will be able to provide an on-the-ground response that officials at SCU are unable to provide. As a result it is important to vet these contacts and organizations to make sure that they are fully equipped and ready to provide a quick and thoughtful response to all types of situations. Relationship building in this case is especially important.

It should be noted that there is no set definition of what qualifies as a partner organization but in general it is an organization that you rely on for advice and support in the proposed country.

**<u>Section 5: Accommodations</u>**

Before you submit your Proposal, it is important to have done thorough research and due diligence in regards to accommodations. TPAC wants to make sure that you have researched this area thoroughly and know that it is safe for SCU participants. TPAC's focus is not on the type of accommodation, for instance a top hotel versus a hostel, but rather on how much information and research you have done. We also want to know if you will be arranging it, if you will be advising participants, and whether or not participants will be setting up their own housing.

Please make sure that you review the DOS recommendations for any notes about areas that may not be safe and areas to avoid at night and share these with participants. Consider if there will be a secure location for students to store valuables and also consider the times of day that students will be coming and going from the location. There may be other important notes about accommodations in the report as well.

In some cases, for instance with individual experiences or for graduate students, participants may be responsible for arranging their own housing. Please encourage these participants to complete thorough research when selecting a neighborhood and accommodation type and that it follows DOS recommendations.

Section 5a - Homestays may not be applicable to all programs but it is a section that TPAC takes a deep, thoughtful look at. In this section you will need to know more than just who organizes the homestay placements. You

will also need to know about how the homestay families are vetted, how long they have been participating in homestays, and if there is a way for participants to communicate with SCU leadership at all times. If you have been working with an organization for a while then you should already know this information. This is a section where the more information you can provide the better your Proposal. Remember that the goal is to provide as complete a picture as possible to avoid having more questions from TPAC.

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**Section 6: Local Transportation**

Similar to Accommodations, you will want to refer to the DOS recommendations to see what suggestions are made regarding preferred methods of transportation. Their recommendations should be addressed in your Proposal.

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When inputting the transportation details, please be specific and note all types of transportation to be utilized. The first step is simply how the participants will arrive at their lodging from the airport. Make sure to consider personal transportation as well, meaning how will the participant get around on their own - will this be via a private vehicle? Via the subway? On foot? Please note if you will counsel the participant to not utilize certain transportation methods. For instance, perhaps in some cities uber is recommended over taxis for safety reasons or vice versa. Public transportation is generally okay in most locations but it may not be for this destination, make sure to do your research and share this with the participants.

If you are utilizing private transportation, you will need to submit the name of the transportation company and the name of their insurance company. The goal is to make sure that participants travel with a reputable, insured company.

As the program coordinator please know that it is your responsibility to know how participants will get around even if you are working with another organization who is coordinating details. One cannot just say - the partner organization will take care of all in-country transportation. More information needs to be provided.

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**Section 7: Finances**

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The Department of the Treasury places some restrictions on locations via Overseas Foreign Asset Control. It is important to look up your proposed travel destination to see if there are existing OFAC restrictions. The link is provided within the Proposal.

Regardless of whether or not there are restrictions you will need to address how participants will plan on accessing money abroad. Will there be easy access to ATMs or is cash preferred? Are credit cards accepted? Is it best to take US Dollars or a different type of currency? Can currency be procured before departure if cash is necessary or is it best to get it at the destination?

Consider the best method for participants to travel with their money as well. Are Debit and Credit cards helpful? Or should all cash necessary be brought with the participant? If yes, then how will the cash be transported in order to ensure the safety of the participants?

Most importantly you need to acknowledge that participants understand how to access their money abroad and will be notifying their banks before departure if applicable.

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**Section 8: Health and Safety Preparation**

This section ties back to the CDC Traveler Health Recommendations that were discussed earlier.

You will notice that on the CDC page for your country there are recommendations for All Travelers, Most Travelers, and Some Travelers. As everyone has unique health needs it is important that you share all of the recommendations with participants early in the process.

Some immunizations have longer timelines than others in order to be effective and others, such as Yellow Fever, are scarce, especially as the summer approaches. As a result, more time is needed in order to make sure that participants receive all required shots in a sequence, have access to immunizations, and have time for the immunization to take effect.

The CDC may also provide other recommendations, for instance the use of bug spray to prevent mosquito driven illnesses.

As you know the itinerary best, we want you to provide a sense of how the recommendations by the CDC will affect your participants activity and participation based on the Some Travelers category. Will there be activities that participants need all recommended immunizations for? This is why it is important to look at all traveler types. If your participants are going to be in remote locations or perhaps the type of research or study they are doing puts them in unique situations, then all recommendations may be needed.

As a reminder you will need to collect the health report from students and provide this to the on-site coordinator. There may be information about disabilities, accommodations, and other health information so please make sure that this information is kept away from other participants and any printouts are shredded at the end of the program.

**Section 9: Program Participants**

The names of all Program Participants need to be sent to Global Engagement. Please use the Participant List Template linked in this section to input and upload your list of participants.

A screenshot of the template is shown here.

If you don't know your exact participants right now, that is okay. On the second tab there is a summary space where you can estimate how many of each category you will have. Once you do know your final travel roster, you will need to send the Global Engagement Office the list of participants.

**Approval Signature**

Based on your department and academic affiliation, you will need to submit the signature or signatures of the approving body. For programs administered by Academic Departments, the Academic Chair needs to provide their signature. Additionally the Dean or High Level Director for Centers and other areas needs to sign. In some cases these positions may have designated a specific person to sign on their behalf and this can be noted on the signature page.

## **Submitting Your Proposal**

Now that you have completed your Proposal it is time to submit. Make sure to give each section one last review so that the information is complete and up to date. The goal is to have a complete Proposal that addresses all questions related to the health and safety of the program. This means that you have included a high level of detail within the Proposal and provided satisfactory answers to all questions that have been asked, demonstrating your care and expertise in administering this program.

As a reminder, you can submit your Proposal at any time before 8 weeks. If it is closer than 8 weeks to the date of departure then you will need to ask for a committee policy exception from TPAC.  It should not be expected that late proposals will be reviewed. If you choose to submit your Proposal well in advance of the 8 weeks it still needs to provide a complete picture of the expected travel otherwise it will not be accepted.

## **Waiting for Approval**

While you wait for approval, make sure to:
- Arrange a pre-departure orientation well in advance of departure that covers
    - visa requirements for the specific country
    - health insurance
    - required and recommended immunizations and/or medications, e.g., malaria medication
    - health and safety in-country
    - money abroad

○ identity abroad, e.g., gender, sexuality, race, religion, ability, class, etc.

The orientation is a very important component for participants, especially as there are a variety of travel experiences. For some participants, this may be their first trip abroad, or even first time on an airplane. Make sure that you cover a broad range of travel preparation in order to create an inclusive atmosphere for students who are experiencing this for the first time.

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At this time you will also need to:
- Distribute and collect signed copies of the University Informed Consent Waiver from all participants  (This is a required component of applications within Terra Dotta)
- Distribute the SCU Code of Conduct, if applicable
- Distribute and Collect the International and Off Campus Programs Travel Health Self-Report (This is a required component of applications within Terra Dotta)
- Collect passport copies from participants

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- Provide Participants with
  ○ DOS Country Specific Information
  ○ CDC Traveler's Health Suggestions, and the
  ○ DOS Worldwide Travel Alert
- Enroll in Overseas Security Advisory Council notifications to receive updates about the specific country
- Ensure that all participants register with the DOS Smart Traveler Enrollment Program (STEP)

As a reminder these items do not need to be sent to the Global Engagement Office or TPAC. These need to be distributed to the participants.

**<u>Approval & Next Steps</u>**

Congratulations!
Now that your program has been approved,
- Send the following items to the Dean of the School or High Level Director of the Center, Campus Safety, and the On-Site Coordinator if they are different from the SCU program coordinator
    - Finalized Program Itinerary including dates, transportation, means of communication and lodging information for travel to, from, and within destination site(s)
    - 24/7 contact information for Program Coordinator throughout the program
    - Finalized list of travel participants including the same detail as requested for the Program Participant List within the Proposal - name, email, ID, role

**<u>In Summary</u>**
As a reminder taking or sending students and other participants abroad is a serious responsibility and we are thankful for your willingness to take this on. It is expected that you will listen to and review the information on this video carefully so that when submitting your Proposal TPAC has a complete overview of your program with all health and safety issues critically addressed. Our focus is on health and safety and, as Program Coordinator, we know you are focused on this too. If you have submitted a well-researched Proposal then you should be well-prepared to handle the situations that may come your way.

**The Proposal is your opportunity to demonstrate how prepared you are to keep students and participants safe while abroad. If you do not**

**feel comfortable bearing this level of responsibility then please speak with your supervisor.**

If you are new to your role as a program coordinator, please feel free to ask questions along the way. Global Engagement can connect you with members of TPAC who can answer your questions and provide guidance.

 We look forward to reviewing your well-researched and thorough Proposal!
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For reference:

## Application Questionnaire(s)

Click the following to view and complete the following online questionnaire(s). You may begin a questionnaire and save it for later completion, but note that you must click Submit in order for the questionnaire to be logged as complete and ready for review.

| Title | Received |
|---|---|
| 1. Program Coordinator Information | ☐ |
| 2. Program Coordinator Role and Responsibilities | ☐ |
| 3. Program Overview | ☐ |
| 4. In-Country Contacts or Organizations | ☐ |
| 5a. Accommodations | ☐ |
| 5b. Accomodations: Homestay (if relevant) | ☐ |
| 6. Local Transportation | ☐ |
| 7. Finances | ☐ |
| 8. Health and Safety Preparation | ☐ |
| 9. Program Participants | ☐ |
| Academic Chair Approval - For Programs Administered by Academic Departments Only | ☐ |
| Dean/Executive Director of Center/Vice Provost Approval | ☐ |