

Faculty-Led Travel Course Handbook



Revised Summer 2023

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Director's Letter

May 2023

Hello Travel Course Faculty Leaders,

Thank you for your commitment to faculty-led programs. You are part of a wide range of academic departments that bring enthusiasm and dedication to leading domestic and international Travel Courses during the January interterm, spring break, or summer sessions. These courses provide participants enriching opportunities to earn credit, learn coursework, and gain a broader perspective of other cultures.

As you are planning your travel course, we want to remind you of some key policies and resources you might find helpful. They are highlighted here for your convenience.

Faculty

- All faculty leaders must be full-time faculty.
- For Travel Courses with 10-19 paying participants, an additional supportive leader is eligible for travel expense reimbursement but does not receive compensation. Sometimes the one compensation is shared (percentage determined by faculty) between the two faculty leaders.
- The university strongly *recommends* two full-time faculty leaders on the Travel Course when a Travel Course recruits 20 or more paying participants on the final roster. With 20 or more paying participants, each leader will receive full compensation for their work. Compensation for travel courses will be paid by course overload contract and cannot be used toward faculty load.
- Regardless of how many participants are on the roster, the university requires two full-time faculty to lead the Travel Course when the group spends an overnight in more than one location. Faculty compensation for more than one faculty leader will follow the guidelines above based on participant numbers.
- Faculty leaders receive per diem, air fare, in country transportation, excursions, a visa, and other miscellaneous expense reimbursements with approval.
 - All faculty travel will be coach/tourist economy class regardless of destination. Any upgrades, such as extra legroom and/or premium seating must be purchased with personal funds and will not be covered through student program fees. Should a traveler require a more expensive flight because of personal preference, the additional cost will be the responsibility of the traveler. While all travel booked for the University should be at the lowest available fare, personal preference as to departure and arrival times will be taken into consideration, as well as the use of alternate airports, and specific airline carriers.
- The faculty's Travel Expense Report must be signed off in Concur within 30 days, or there will be a two-year suspension from leading a Travel Course.
- At the request of the Provost, the student evaluations will be sent to the Dean of the faculty member(s) leading the Travel Course.

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Family Members

- Spouses and significant others can be supportive leaders or co-leaders on a travel course if they are full-time Chapman faculty.
- Other adult family members can travel to the country location of the Travel Course. However, they cannot participate in any of the excursions, in country transportation, group meals, or anything else covered as part of the student fee cost of the Travel Course.
 - Larger room upgrades for family members who are not co-leaders will be paid from faculty's personal funds and not covered through student program fees.
 - Minors of faculty leaders are not permitted to travel to or participate in the Travel Course itinerary, planned activities or excursions.

Program Support

- All **international** Travel Courses require a third-party provider.
- All **new domestic** Travel Courses require a third-party provider.
- **Repeat domestic** Travel Courses do not need to use a third-party provider.

Tuition Waivers

- Graduate students enrolled in Executive MBA, Physical Therapy, and MFA/FTV Conservatory programs are not eligible to use the Travel Course Tuition Waiver due to their tuition structure.

Enrollment

- Anyone other than an enrolled student taking the Travel Course for Chapman credit must get prior approval from the Provost. Students or faculty members from another university, a neighbor, an outside business associate, etc., without ties to the university will not be permitted to join. Faculty are responsible for soliciting the approval from the Provost.
- All Travel Courses will open and become live on the Center for Global Education (CGE) website and Global Gateway on the same day. Interterm Travel Course opportunities will be available in mid-August, and summer Travel Course opportunities will be available in mid-January. All departments must sign off on all Preliminary Budgets before they can open to applications and recruitment.
- Students may participate in more than one Travel Course during the summer term if the program dates do not overlap.

We look forward to our continued collaboration and partnership with Chapman University faculty-led programs.

Safe travels!

Kristin W. Beavers
Director, Global Education

Introduction

“Experience, travel – these are an education in themselves” – Euripedes

The mission of Chapman University is to “provide a personalized education of distinction that leads to inquiring, ethical, and productive lives as global citizens.” Faculty members who conduct courses abroad directly contribute to the fulfillment of this mission. The University values these efforts and is committed to ensuring that all faculty members engaged in these pursuits are properly supported.

An important part of Chapman University's educational mission is to help participants develop a global understanding of other peoples and cultures of the world, engage in opportunities that enhance their on-campus education, and open doors for their future. The Center for Global Education (CGE) seeks to provide these opportunities to the Chapman community. Faculty-Led Travel Courses provide excellent teaching opportunities and allow faculty to bring classroom education to life. They allow group members to experience first-hand the people, places, cultural differences, and institutions they are exploring. Hopefully, each participant and faculty member will come away with positive experiences that change the way they see the world and themselves.

While Travel Courses can be rewarding for both participants and faculty, they do require a great deal of effort. The CGE will assist full-time Faculty with developing and planning the course, completing the necessary paperwork, coordinating with Third-Party Providers, promoting the course to prospective participants, and developing a budget aligned with university policies and procedures. There are many departments, offices, and people all working together to make your Travel Course a success.

The CGE:

1. Provides faculty and participants with appropriate application requirements and forms.
2. Collects participants' Enrollment and Financial Obligation Agreement, facilitates deposit and final payments, monitors required materials for each program and informs participants of missing application materials. An account for each participant is created in our online application portal, Global Gateway
3. Contacts the Dean of Students, Student Business Services, and Financial Aid to ascertain any financial or disciplinary concerns about applicants.
4. Assists faculty leaders in following up with participants who have questions.
5. Coordinates program budget and arranges billing and payment methods with the Travel Course provider, faculty, Academic Financial Operations, and Student Business Services
6. Registers all participants in the course.
7. Creates a Faculty Cash Advance so they receive it before departure.
8. Ensures that the application materials required for participation in the Travel Course have been submitted and are in the participants' application portal before departure.
9. Provides pre-departure orientation information for participants and faculty.
10. After the completion of the program, work with faculty to reconcile expenses and clear monetary advance within the required 30 days.
11. After the electronic or hard copy of participant surveys are received by CGE, a report and summary of participants' responses will be created and shared with faculty

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Faculty:

1. Develop a course syllabus and a basic itinerary for the proposed Travel Course
2. Consult with Dean regarding faculty's course reduction or compensation for Travel Course responsibilities based on your final participant numbers.
3. NEW: Complete a Risk Management Checklist and meet with Risk staff to discuss potential risks
4. Complete a Travel Course Planning Worksheet for a new or repeat Travel Course and coordinate requests with a Travel Course Third-Party Provider and CGE
5. Spouses or significant others can be Travel Course faculty co-leaders or supportive leaders as long as they are full-time faculty at Chapman University
6. Consult with Travel Course providers regarding travel arrangements, accommodations, and requested excursions.
7. Family members cannot participate in any of the excursions, in country transportation, group meals, or anything else covered as part of the student program fees of the Travel Course (even if the faculty leader pays for the family member from their own personal funds).
8. Approve preliminary and final budgets developed with the CGE.
9. Promote your program and recruit participants for the Travel Course
10. Create and review potential participants' preliminary application requirements (i.e., short essay questions, letter of recommendation, interview, etc.) and select participants.
11. Keep the CGE informed of correspondence with vendors and participants to avoid duplications.
12. Follow all University rules and requirements including offering academic content consistent with College, Department, and University standards and faculty by-laws.
13. Provide an inclusive academic curriculum, promote equity, and access in recruitment, and develop meaningful outreach programs and partnerships with diverse communities. Diversity and inclusion are vital to the fulfillment of the University's mission. An inclusive learning environment facilitates complex, critical, and creative thinking and the differences in identities, values, beliefs, and perspectives are fundamental to a comprehensive education.
14. Provide the CGE with accurate information about the final travel arrangements and contact information at every stage of the program.
15. While on the course, Faculty are responsible for all group participants 24/7, even during the non-scheduled time. This ensures safety for each participant.
16. Keep original receipts and/or take photos of both the detailed and total amount receipts to upload into the Concur system, monitor program expenses frequently, then work with Accounts Payable and CGE to reconcile expenses and clear your cash advance within 30 days after your program ends or there will be a two-year suspension from leading a Travel Course.

Steps for Faculty Leading a Travel Course



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Planning a Travel Course

Timelines

Travel Courses run in two terms at Chapman University

- **Interterm/Spring Break:** This refers to the term during January, as well as Spring Break, and coincides with timelines and guidelines for Interterm.
- **Summer Session 4:** Travel Courses occurring during the months of May, June, July, or August will follow the timeline and guidelines for Summer Session 4.
 - **Note:** For Summer Session 4, it makes no difference when a program departs/arrives during the summer months. Every summer Travel Course is registered in Summer Session 4 (IV) and will adhere to the attendance, course change, and grading practices set in place by the university for that session.

Travel Course planning normally takes at least a year before the program runs. Once a faculty member has an idea for a program, they need to consider course logistics including: Where do you plan to go? Which term will you go and for how long? What are your course learning objectives and how can you meet them? How many participants will you take? Does your department share your plans and goals?

Refer to the following tables for information regarding general timeline dates:

INTERTERM TRAVEL COURSES

Date	Function	Department	Notes
Early March	Course syllabi due for a NEW Travel Course	Faculty, Provost	Syllabi due to Academic Council for review and approval of a NEW TC before deadline
Mid-August	Preliminary Budgets due	Faculty, CGE	Must be Fully signed off through AFO; All Travel Courses go live
Late October	Participant Deposits, All Pre-Decision Global Gateway requirements due	CGE	Participant's Global Gateway account through the CGE online portal
Late October	Travel Course Cancellation	CGE, SBS	If 10 participants have not deposited, a TC is canceled; participant deposits are refunded
Mid-November	Final Budgets due	Faculty, CGE	A single per-participant cost is finalized and sent to the Student Business Services office
Mid-November	Registration	CGE, Registrar	CGE processes student registration for the Travel Course
Late November	SBS generates billing	SBS	Student accounts are billed
Mid-December	Final Payment and Post-Decision Global Gateway requirements due	CGE	All application requirements in Global Gateway must be completed including final payment receipt

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SUMMER TRAVEL COURSES

Date	Function	Department	Notes
Early October	Course syllabi due for a NEW Travel Course	Faculty, Provost	Syllabi due to Academic Council for review and approval of a NEW TC before deadline
Mid-January	Preliminary Budgets due	Faculty, CGE	Must be fully signed off through AFO; All Travel Courses go live
Late March	Participant Deposits, All Pre-Decision Global Gateway requirements due	CGE	Participant's Global Gateway account through the CGE online portal
Late March	Travel Course Cancellation	CGE, SBS	If 10 participants have not deposited, a TC is canceled; participant deposits are refunded
Mid-April	Final Budgets due	Faculty, CGE	A single per-student price is finalized and sent to the Student Business Services office
Mid-April	Registration	CGE, Registrar	CGE processes student registration for the Travel Course
Late April	SBS generates billing	SBS	Student accounts are billed
Mid-May	Final Payment and Post-Decision Global Gateway requirements due	CGE	All application requirements in Global Gateway must be completed including final payment receipt

Administrative Policies and Procedures

U.S Department of State Travel Advisories

Once the location of the Travel Course is known, faculty planners should check with the [State Department website](#) to make certain there are no travel advisories that would prohibit Chapman from sponsoring travel to the country.

All countries are issued a Travel Advisory level that can change at any time. Aside from the overall Travel Advisory level for a country, levels of advice may vary for specific locations or areas within a country. For instance, the U.S. Department of State may advise U.S. citizens to “Exercise increased caution” (Level 2) in a country, but to “Reconsider travel” (Level 3) to a particular area within the country.

Level 4 - Do Not Travel is the highest advisory level due to greater likelihood of life-threatening risks. During an emergency, the U.S. government may have very limited ability to provide assistance. The Department of State advises that U.S. citizens not travel to the country or to leave as soon as it is safe to do so.

Because a Level 1 Travel Advisory still discusses the need for caution, all students traveling on a Chapman program will be required to sign an acknowledgment that they are aware of the risk level for the country or countries in which they are traveling. This includes students on semester abroad, short-term Travel Courses or internships, independent study or research, conferences, etc. Please direct all students with whom you are working on international travel to their application requirements on the Global Gateway for completion of the acknowledgment form. In the event the travel is to level 3 or 4 countries, or countries that contain

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level 3 or 4 regions, then the proposed travel will be referred to Chapman's International Risk Management Committee (IRMC). The IRMC will review the risk factors and determine if the university will allow a Chapman program to travel to the area.

In the interests of safety, the University encourages all persons, including graduate students and faculty/staff, to carefully consider these travel warnings and plan their travel accordingly.

- 1 Exercise normal precautions** Please refer all questions on this policy to the Risk Management Office, RiskManagement@chapman.edu or phone (714) 515-5660.
- 2 Exercise increased caution** For more information, refer to the [U.S. Department of State Website](#).
- 3 Reconsider travel** **Medical Precautions** may be reviewed by going to the [Centers for Disease Control and Prevention website](#). The CDC includes sections covering Destinations, Travel Notices, Find a Clinic, Disease Directory, Information Centers for Travelers, Mobil Apps, RSS Feeds, Yellow Book, and more.
- 4 Do not travel**

Smart Traveler Enrollment Program (STEP)

Faculty and Travel Course participants self-register by entering their passport data on [the U.S. Government STEP website](#). By doing so, faculty and participants receive updates on Travel Advisories, Travel Alerts, and other information that pertains to a group's particular country. Announcements of possible demonstrations, rallies, and threats for areas where your group plans to visit may be received. Also, registration helps the Department of State better assist you in an emergency. Before, during, and even after the travel period, information is received from the nearest U.S. Embassy or Consulate that relates to the travel destination.

The STEP information is helpful because it may prevent a harmful situation, and/or allow for a safe detour in the event of a threatening situation, disaster, etc.

AlertTraveler App

Chapman University provides the AlertTraveler system to help keep faculty and students safe while traveling. This system will keep you informed of critical events that may impact you while abroad and will allow Chapman to better assist you in the event of an emergency. AlertTraveler offers up-to-date country and city travel intelligence in your pocket, including location safety scores and practical information. Keep up to date with timely alerts based on your GPS location. All faculty and student participants must download, activate, and opt-in to the AlertTraveler app. Instructions will be provided by the CGE.

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Faculty Compensation

All Travel Course group leaders must be current full-time faculty member at Chapman University.

Compensation for Travel Courses will be paid by course overload contract and cannot be used toward faculty load. Questions regarding compensation should be addressed to the faculty's department operations manager.

For Travel Courses with 10-19 paying participants, an additional supportive leader is eligible for travel expense reimbursement and does not receive compensation. The lead faculty may agree to share the compensation with the co-leader. The percentage is determined by faculty. The secondary leader assists the lead faculty with group support, management, help with illnesses, and emergencies should they arise.

The university strongly recommends two full-time faculty leaders on the Travel Course when a Travel Course recruits 20 or more paying participants on the final roster. With 20 or more paying participants, each leader will receive full compensation for their work. Alternatively, if there are two faculty leaders, one or both faculty leaders will receive compensation based on an overload course contract, and approval of their Dean.

Regardless of how many participants are on the roster, the university requires two full-time faculty to lead the Travel Course when the group spends an overnight in more than one location. Faculty compensation for more than one faculty leader will follow the guidelines above based on participant numbers.

Faculty leaders receive per diem, airfare, in-country transportation, excursions, a visa when required, and other miscellaneous expense reimbursements with approval.

These funds are collected from the paying participants, who are responsible for all travel costs for the Travel Course leaders (except salary) through their paid Travel Course program cost.

- [Domestic per diem](#) is based on the rate determined by the Internal Revenue Service each fiscal year for the individual city.
- [International per diem](#) is based on the Department of State regulations.

Faculty per diem is provided no more than one day before the course begins and ends on the last day of class. Daily per diem is divided amongst meals: Breakfast 20%, Lunch 30%, and Dinner 50%. The actual per diem amount faculty receive in their cash advance is based on the course's final budget and will not be adjusted in the event of currency fluctuation.

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Faculty-Led Travel Course Guidelines

Number of Paying Participants	Overnight Locations: One or Multiple	Faculty Compensation	# Full-time Faculty Required
Less than 10 paying participants	Program Canceled	0	0
10-19 paying participants	1 Location	Faculty 1: Overload Course Contract + travel expenses Faculty 2: travel expenses only*	1 Required 2nd Optional, not mandatory
20 or more paying participants	1 Location	Overload Course Contract + travel expenses for faculty 1 and faculty 2*	1 Required 2nd Optional, not mandatory
10-19 paying participants	2 or more locations	Faculty 1: Overload Course Contract + travel expenses Faculty 2 gets travel expenses only *	2 Required
20 or more paying participants	2 or more locations	Overload Course Contract + travel expenses for faculty 1 and faculty 2*	2 Required

*Salary may be split between faculty who are co-facilitating the course. Ratio determined by faculty.



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Academics

“All course offerings should be in accord with the general requirements of Chapman University, the needs of department majors, and the needs of the student body. Faculty members are expected to conduct their classes at a level appropriate to the level of the assigned course. Each instructor is responsible for providing a learning environment conducive to achieving the learning outcomes specified for each course, by planning and presenting the assigned course material; establishing course objectives and requirements and making them known to students; selecting and ordering texts and supplemental materials; preparing, administering, and grading papers and examinations; and assigning grades.” (Taken from [Faculty Responsibilities](#), University Expectations, p.22)



Creating the Syllabus

Please use the Academic Council and WASC’s policy on requirements and credit for Travel Courses. Find them on the [Center for Excellence in Teaching and Learning](#) and in the [Curriculum Handbook](#).

New Travel Course

For a new Travel Course, the faculty creates a course syllabus containing the number of planned contact hours with the students before, during, and after the travel dates. Each credit hour requires a minimum of 15 contact hours in one week. 3 credits would require 45 contact hours spread over 3 weeks. So, a Travel Course must pass two separate tests: 1 week per credit hour, 15 contact hours each week. So, as an example, if a course has all 45 contact hours in a single week, it counts as 1 credit. Refer to [Chapman’s policy on credit hours](#).

Also, a new Travel Course must include a justification as to why the course is a Travel Course, instead of an offering on campus. What specifically can the student see and/or experience on the Travel Course that they cannot on campus, and how does it relate to the subject being studied?

Academic Integrity

The Academic Council requires the same information for a Travel Course that they require for a regular on-campus course. If any required information is not included, the Travel Course approval may be delayed. Examples of this information are the following:

1. The number of points or percentage of the grade on each type of assignment such as exams, paper, etc.
2. The dates and number of contact hours before and after the travel portion.
3. [Academic Integrity](#), Disabilities Policy, and Equity and Diversity Statement in the syllabus, as outlined in the [Curriculum Handbook](#) under Required Syllabus Content.

Itinerary

A general itinerary is required in a Travel Course proposal and submitted with the syllabus. Please provide a proposed day-by-day schedule of lectures, meetings, and site visits planned for the program. This information must be identified before the Associate Provost and Academic Council approves a syllabus. They will contact the faculty member if any changes are necessary.

Submitting a New Travel Course Syllabus

First, submit the new syllabus and itinerary to the corresponding department for Departmental approval. Once the Travel Course has Departmental support, the group leader or department assistant may enter it into the online course approval system, [Curriculog](#).

The link can also be found on the [Chapman Directory](#).

The Associate Provost is extremely knowledgeable and helpful with any questions regarding the online Course Approval System, so please contact their office for further guidance (714) 997-6676.

Repeat Travel Course

If the Travel Course has gone through the approval process in the past, no additional approval action is required if the course content, requirements, learning materials, etc. remain the same as before. The Associate Provost for Academic Affairs will send the CGE the Travel Course form's link for CGE records, not approval, before forwarding it to the office of the Registrar.

Faculty will need to complete the following steps:

- 1) Faculty or someone from the department will need to go into the course approval system [Curriculog](#) and reactivate the Travel Course in the course master.
- 2) Once the course is active, the information is then entered into PeopleSoft by the Office of the University Registrar, and the course sections and student enrollment will be handled by the CGE.

New Destination for Previously Approved Travel Course

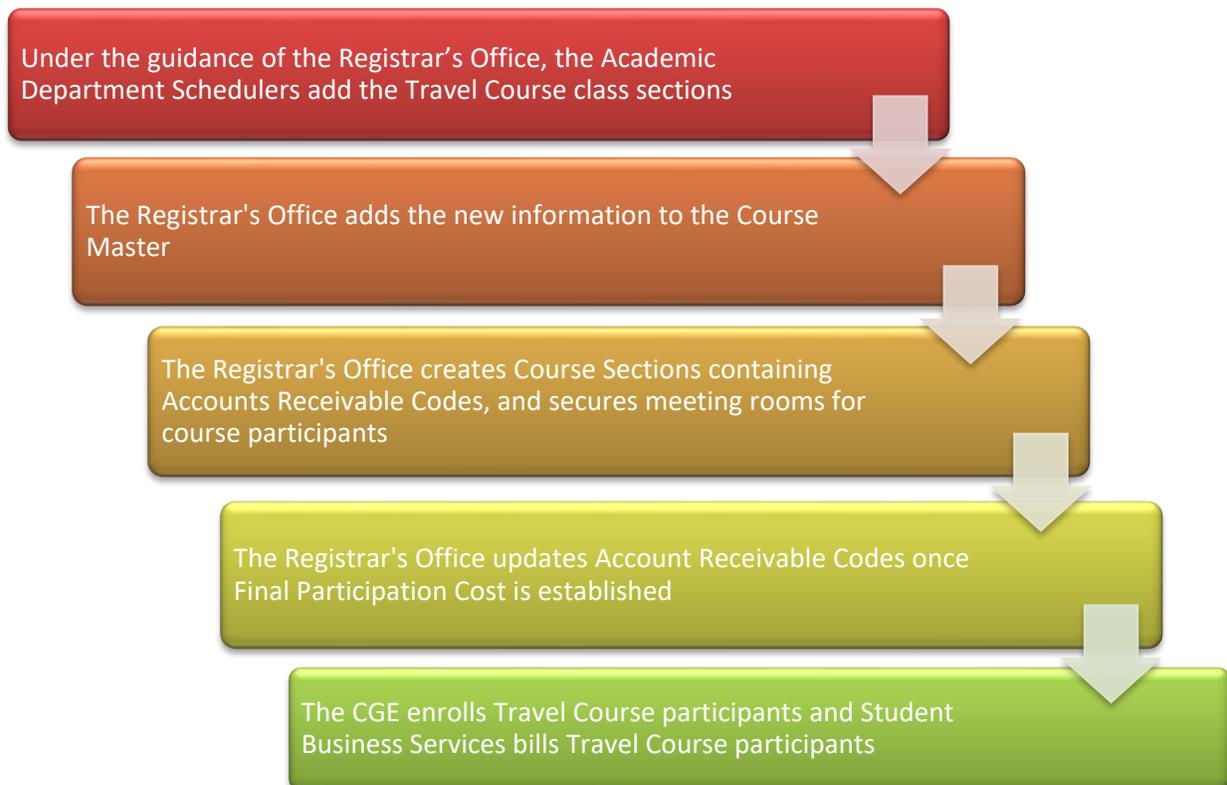
If the Travel Course syllabus and itinerary is the same and the faculty member is going to a new location, the faculty member must email the course syllabus and general itinerary to the Associate Provost for location approval and edit the syllabus location within the online course approval system.

If you plan to lead this Travel Course to different locations in different terms, you can create a syllabus and itinerary that is not location-specific in order to keep using the same course in the system every term. This way, you won't need to change your course in the course catalog or receive new approval whenever you change course location.

Course Setup for Travel Courses

Once the Associate Provost has approved the course as a Travel Course, the online syllabus will be routed via the Director of Global Education to the Office of the University Registrar.

After the Travel Course has been approved, the CGE will notify the faculty that the new Travel Course is approved, and the following steps are taken to design the program:



Designing a Program

Complete a Planning Worksheet for a New or Repeat Travel Course

This completed worksheet is used for identifying details, soliciting proposals, and creating budgets for a Travel Course program. When the planning worksheet is complete, proceed to the online course approval process. [View the Faculty Travel Course Planning Worksheet.](#)

The Travel Course Advisory Board will review the Faculty Travel Course Planning Worksheet for academics and location requested.

Travel Course Providers

- All **international** Travel Courses require a third-party provider.
- All **new domestic** Travel Courses require a third-party provider.
- **Repeat domestic** Travel Courses do not need to use a third-party provider.

Soliciting a Provider

Because of insurance and liability issues, the university prefers to use a single provider for all services on an individual Travel Course. The CGE maintains a readily available, non-exhaustive provider database. Faculty members can solicit, arrange for, or consult with providers on their own without approval/assistance from CGE. If they prefer to deal directly with the providers, they may negotiate with them, but all negotiations are considered unofficial until the university has signed a contract with that provider.

If a faculty member is requesting services from a new provider the university has never used before, we suggest the faculty member send the provider a copy of the general contract requirements along with their Planning Worksheet. It will save a lot of time if they are unable to work within our university-mandated contract specifications, particularly the insurance requirements.

If faculty propose a third-party provider and they are unable to meet the contractual stipulations required by Chapman University, the university is unable to purchase 'gap insurance.' Insurance companies will not sell Chapman University liability insurance to a third-party provider. Failing to meet Chapman University's liability requirements will delay or jeopardize the forward motion of your Travel Course. Partnering with a proven provider is strongly recommended.

Soliciting a Provider through CGE

If a faculty member prefers, the CGE will initiate a search for a program provider after a Travel Course Planning Worksheet is received by the CGE. The detailed planning worksheet will be sent to various providers to collect proposals for the program. The CGE will inform the group leader(s) which providers have responded affirmatively. Once the proposals have been received, the faculty will review the proposals. Faculty leaders determine which proposal they want to accept, based on the proposal, pricing, and itinerary provisions. The CGE is available to advise and answer questions for this process.

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Changing Providers

If a faculty member is unhappy with a provider, they may choose a new provider until there is a signed contract. Contracts are signed only after the faculty member has approved the provider and the provider's final Travel Course proposal. Depending on the development stage of the program, changing providers may cause a program to go live after the beginning of the official recruitment period.

Contracts with Providers

The CGE, Risk Management, and Legal Affairs have been charged by the senior staff of Chapman University to negotiate contracts. All university contracts must be signed by the Executive Vice President & Chief Operating Officer. We will share a sample Agreement between Chapman University and the Program Provider upon request.

Destinations

One Location

Once the location or locations for the Travel Course has been determined, Chapman University will only compensate one faculty person for every 10 paying participants. While the university does not require a second group leader for a Travel Course staying overnight in one city, it strongly recommends that faculty take a second individual (full-time faculty) to share the responsibilities for the group especially if an emergency arises. A second individual would be able to assist the individual(s) who needs extra care or time before continuing with planned activities. If the Travel Course is over and a participant is unable to travel back home with the group because of an emergency or medical situation, the second leader could stay with the person until they are able to travel. During the academic program, no Chapman University participant should remain behind in a city or country on their own without a Chapman University leader present.

Multiple Locations/More Faculty

If the group is traveling to more than one location for one or more nights, two leaders are required by the university. That way, if an emergency arises, one of the group leaders remains behind with the situation created by the emergency, and the other group leader can continue with the program itinerary. No Chapman University participant should remain behind in a city or country on their own without a Chapman University leader present.

It is advisable that two faculty members supervise and lead Travel Course participants if the group size exceeds 20 participants. This allows a faculty leader the opportunity to have assistance in the case of emergencies, support for management of the group, and activities.

All Faculty Leaders who plan to offer a Faculty-Led Travel Course program during Interterm or Summer will attend a Risk Management/Risk Assessment meeting with the Risk Management team. This meeting is required prior to a course receiving approval for recruitment.

Creating a Budget

Preliminary Budget

When faculty receive a proposal from the provider, if additional questions or revisions are required, the CGE encourages faculty to contact the provider directly to clarify and incorporate the revisions desired for expanding their proposal to include new excursions, locations, or meetings, etc.

Once the faculty have an acceptable proposal from the provider, faculty will complete a Travel Course Risk Management/Risk Protocol Checklist and meet with Risk Management administrators to review the proposed program and risks.

The CGE will develop a preliminary budget with a minimum of 10 participants for a new Travel Course, or the budget may be based on an estimated higher enrollment at the request of faculty. This usually results in a lower per participant cost, however, there is also a risk of the course failing to meet enrollment. Should the budget be based on a higher enrollment number, and an insufficient number of participants register for the course, the course may be canceled. The preliminary budget will be expressed in a range between two prices: a minimum and a maximum. The range accounts for a ten percent buffer. A final budget (see below) cannot exceed the maximum price in the preliminary budget.

****NOTE: A Travel Course budget will not cover Faculty Trip Cancellation Insurance. If faculty wish to purchase Trip Cancellation Insurance, they are personally responsible for the costs.**

When faculty agree with the details and cost contained within the preliminary budget, it is routed along with the TC Risk management/Risk Protocol Checklist for approval signatures from the faculty leader, Department Head, Dean, Director of Global Education, and Office of the Provost. Travel Courses will only be eligible to open for recruitment after the preliminary budget has been signed off by all required parties and the faculty leader(s) who organized the course attend a separate Risk Management/Risk Assessment meeting outside of regular Travel Course training with the Risk Management team. In that meeting, faculty leaders are provided with important information on how to use the Risk Management/Risk Protocol Checklist, what are critical risk management concerns, and what guidelines are in place for developing emergency plans in advance of traveling. Instructions on reporting requirements during and following the Travel Course will be reviewed. This meeting is required prior to a Travel Course being approved for student recruiting, and enrollment.

Subsequently, travel course leaders must attend a Risk Management/Risk Assessment meeting for courses travelling annually, with the time frame to be determined by the Travel Course Advisory Board. A faculty member whose travel course misses two or more years in being offered must attend this meeting prior to the trip being approved for offering again.

Not complying with this meeting requirement will result in the course not being made available to students for the upcoming term. These Risk Management/Risk Assessment meetings are to be scheduled twice a year; once in November for summer programs and once in May for Interterm programs.

Faculty-Led Travel Course Handbook

Final Budget

After the enrollment period deadline and initial deposits have been collected, the CGE creates a budget using the final number of paying participants who have committed to the Travel Course program. Chapman University policy requires a minimum of 10 paying participants to be enrolled by the application/deposit deadline.

Accountability

Travel Courses are self-funded. When a Dean signs the preliminary and final budgets for a Travel Course, they certify that the faculty member's college is ultimately responsible for any expenses incurred on the Travel Course's behalf that is not included in the budget. Faculty members are responsible personally for any expenses of a personal nature, such as meals and lodgings before or after the course, personal travel, personal purchases, etc.

Accountability for Drugs and Alcohol

While developing your preliminary and final budget, it's important to keep in mind Chapman's guidelines and policies regarding consumption of drugs and alcohol. Policies may differ between undergraduate and graduate programs, and you must follow the regulations based on the youngest participant.

All programs must follow the Federal, State and Local Laws regarding Drug and Alcohol contained in [Chapman University Staff and Administrative Handbook](#). Below are some relevant sections for your reference:

2.11.8.3 Federal, State and Local Laws Regarding Drug and Alcohol

b) Laws Regarding Alcohol Use

Chapman University has established an alcohol use policy based on the tenet that those serving and drinking alcohol will do so responsibly, with concern for others around them, and with an understanding of the social, personal, and legal issues involved.

The following is a summary of the more important laws that directly relate to the University's Alcohol Policy:

1) Minors

Definitions: The State of California requires that individuals be twenty-one (21) years of age to purchase alcoholic beverages or to consume it in any on-sale premises (Business and Profession Code §256658 (b)).

Additionally:

- a) It is a misdemeanor for anyone to sell, furnish, or give or cause to sell, furnish, or give any alcoholic beverage to a minor (Business and Professional Code §25658(a)).
- h) Any person providing an alcoholic beverage to a minor will be contributing to the delinquency of a minor and guilty of a misdemeanor (Penal Code §272).

2.11.8.7 Procedures for Students, Staff, Administrators, and Faculty Involved in Alcohol and Substance Abuse
All members of Chapman University must comply with all University policies as well as with local, state, and federal laws concerning alcohol and drug use.

Faculty-Led Travel Course Handbook

Chapman University Fiscal Policies

7.2.6.1 Meals

The appropriate University Vice President may with special exception authorize reimbursement of actual meal expenses instead of the standard per diem. The actual expense must be supported by the original receipt (**showing itemized purchases**) and may not include alcoholic beverages.

7.2.6.4 Entertainment

Reimbursement for alcoholic beverages is subject to authorization by a Vice President. The University will not reimburse individuals for personal consumption unless proper authorization has been obtained. The department head should initial the actual expenditure to indicate approval. General approvals of a Travel Expense Report as a whole do not constitute approval for alcohol expenditures.

Chapman University Student Conduct Code

3. **Alcoholic Beverages** – The following behaviors are prohibited:

- a. The sale, possession, use, consumption, production, purchase, or provision of alcoholic beverages to or by any person under the age of 21.
- c. Hosting events providing alcohol without first securing authorization from the Vice President and Dean of Students or designee and adhering to the guidelines provided.

Student Code of Conduct Update Summer 2023: Students enrolled in a Chapman University study abroad program, travel course, or international internship will be responsible for following the drinking age of their travel location.

- This provision allows a student to purchase or consume alcohol within a country where the legal drinking age may be below the age of 21, as defined here in the United States.
- Since the Code allows this age modification in each location, it should not be interpreted differently by faculty/staff.



Costs for Travel Course Participants

Travel Course participants are charged the Travel Course expenses computed in the final budget. **The Travel Course participant's fee is exclusive of any tuition a student may pay for the course itself.** If an undergrad student is full time in the fall semester before and full time in the spring semester after at Chapman, that student may participate in an Interterm course without paying additional money for up to 4 tuition credits.

If a graduate student would like to enroll in a Travel Course during Interterm, we highly recommend they consult with their Program Department to see whether or not they will be responsible for additional tuition fees on top of the program and travel costs **before** they submit a Travel Course Enrollment Authorization and Financial Obligation Agreement and other application requirements.

For tuition questions, please contact Student Business Services (SBS). SBS determines whether a Travel Course participant is charged or waived the tuition fee, and the amount to be billed.

Policy on Tuition and Waivers

If a student participates in a Travel Course led by a Chapman University faculty member during Interterm or summer, they may be eligible for a [One-Time Tuition Waiver](#). The tuition waiver must be completed and submitted to the Student Business Services (SBS) located in Bhatthal Student Services Center. Submitting the form does not guarantee approval for the Travel Course Tuition Waiver. Students must meet the eligibility requirements prescribed by SBS.

Undergraduate Students

Students who complete a full-time semester at Chapman University in the fall and are enrolled as full-time semester students at Chapman University in the spring, are not charged tuition for an Interterm Travel Course. Students are still responsible for paying for Travel Course program fees. Students who have completed at least two full-time semesters at Chapman University may be eligible for a one-time tuition waiver (up to 4 credits) for an international Summer Travel Course. This waiver does not apply to program costs - only tuition fees. This tuition waiver is only for a single course. It is not designed for a student to take a second course and only pay for two credits. Travel Courses in the USA and Canada do not qualify for the tuition waiver. Transfer credits do not count toward fulfilling enrollment requirements for the tuition waiver. View the [Tuition Waiver webpage](#) for specific questions regarding qualifications for the tuition waiver. The waiver is valid during interterm and summer and the CGE does not advise on student eligibility. For additional questions, please contact Student Business Services in.

Graduate Students

- All students who are interested in having their tuition waived must apply for this waiver through Student Business Services (SBS).
- Graduate Students must have completed 15 credits at Chapman University before they are eligible for a Travel Course Tuition Waiver for up to 4 credits. If a graduate student has not completed 15 credits, they must pay full tuition for the Travel Course. After completing 15 credits, the student may apply for the Tuition Waiver. The Tuition Waiver will credit up to 4 credits but not to exceed the number of credits earned and tuition charged for the Travel Course at the time of eligibility.
- Graduate students enrolled in Executive MBA, Physical Therapy, and MFA/FTV Conservatory programs are not eligible to use the Travel Course Tuition Waiver due to their tuition structure.

Faculty-Led Travel Course Handbook

Refund Policy

Because of prepayment requirements associated with travel, Travel Courses do not follow the refund deadlines and procedures of on-campus interterm or summer courses.

Paying Participant deposits are non-refundable and non-transferable for any reason including, but not limited to, injury or illness unless one of the following occurs:

- The course is canceled by the University.
- A student fails to receive preliminary clearance from the Dean of Students office.

In addition to a paying participant's loss of deposit, they are also responsible for the **total cost** of the course and all other expenses incurred on their behalf if any of the following occur:

- 1) Paying Participant withdraws from the course any time after enrollment; or
- 2) Paying Participant becomes unable to participate due to injury or illness at any time after enrollment; or
- 3) The student becomes ineligible to participate after the preliminary clearance has been provided by the Dean of Students' office.



Faculty-Led Travel Course Handbook

Marketing, Participant Recruitment, and Enrollment

Marketing

Detailed information regarding a Travel Course may not be disseminated to the participants until the course and preliminary budget are approved. Program information must also provide specific participation requirements or course prerequisites if any. During the semester preceding the Travel Course, the Center for Global Education will advertise Travel Courses on the CGE website, Global Gateway, social media, and email blasts. Posters, signs, flyers, etc. are not provided by the CGE, but faculty can work with the [Strategic Marketing and Communications](#) Office to develop these materials, if desired. Marketing budgets should be developed for such expenses outside of the budget developed for the Travel Course. It is ultimately the faculty member's responsibility to recruit participants for their Travel Course.



Faculty who plan to hold information sessions for interested participants may work with Departmental Staff to reserve space and services required through the [Event Scheduling Office](#). Due to the high volume of requests, Event Scheduling asks for an allowance of at least five business days for confirmation of space and/or services. Once faculty have received confirmation of space and services for the information session, send the details to the Assistant Director, Travel Courses and International Internships so it can be added to the Program Brochure in the Global Gateway, included in social media blasts, etc. A CGE representative would be happy to attend the information session to briefly cover application requirements, university deadlines, financial commitments, Cancel for Any Reason Insurance, enrollment for the Travel Course, etc. Just let your CGE Advisor know if you would like them to attend.

Advertising Literature

The advertising literature must specify the **Cost Range** of the Travel Course and indicate that tuition is not included. Sometimes students assume that the cost of airfare, meals, books, and supplies are all covered within the Travel Course fee. Some of these expenses may be included in the Professional Services proposal, however, most of the time airfare, most meals, visas, and personal souvenirs are at their own expense. Participants must be made aware of additional costs they will incur during their travel. If the Travel Course is scheduled for the summer session, the Tuition Waiver policy must also be noted in all written documents to the students. The CGE distributes [Travel Course Budget Worksheets](#) online and in the office to help students plan for their full cost.

Sample Travel Course Flyer

Travel during **SPRING BREAK 2023**

Panama & Costa Rica

STRENGTHEN YOUR RESUME

with an international focus. *Corporate visits* in Panama City & San Jose to U.S. Commercial Service, Panama Canal Authority, Digital B2C, IBM, Costa Rica Investment Promotion Agency, Citigroup, Asuaire, & Hacienda Alsacia – Starbucks Coffee Farm.

Cultural excursions to rainforest and Embera community in Panama and full-day Tortuga Island cruise in Costa Rica.

ORANGE CAMPUS: Saturday mornings, February 11, 18 & 25.
PANAMA & COSTA RICA: March 18 through March 26.

PROGRAM FEE: \$3,496-3,846 includes most meals, local transportation, local guides, flight from Panama City to San Jose (Does not include international airfare), 4 star hotel accommodation

Satisfies emphasis in International Business, Management or Marketing. Global Study requirements.

BUS 486 BUSINESS ACROSS CULTURES (3 CREDITS)

E-MAIL: NMURRAY@CHAPMAN.EDU
TO GET ON THE INTEREST LIST

**UNDERGRADUATE TRAVEL COURSE
SPRING 2023**

San José
Panama City

CHAPMAN UNIVERSITY | **Argyros School of Business and Economics**
Walter Schmid Center for International Business

Faculty-Led Travel Course Handbook

Participant Recruitment Policies

All Travel Courses will open up and become live on the [Center for Global Education \(CGE\) website](#) and [Global Gateway](#) on the same day. Interterm Travel Course opportunities will be available mid-August, and summer Travel Course opportunities will be available mid-January. All Preliminary Budgets must be completely signed off by all departments before they can open for applications.

On that day, all relevant departments are notified of what Travel Course opportunities exist and deposits are accepted for Travel Courses through the Global Gateway.

Once all Preliminary Budgets are signed off, and the Travel Courses are listed on both the CGE website and Global Gateway, students may submit deposits and application materials.

Budgets and contracts with repeat providers will be finalized after the recruitment period ends. An executed contract with the provider will include the number of participants committed to the Travel Course, and all professional services listed on the itinerary. A signed contract cannot be changed.

If a faculty member falls short in securing the budgeted number of paying participants for the course, the contract will be voided, and the course will not run.

Anyone other than an enrolled student taking the Travel Course for Chapman credit must get prior approval from the Provost. Students or faculty members from another university, a neighbor, an outside business associate, etc., without ties to the university will not be permitted to join.

To give you as much flexibility as possible, we will request Professional Service Providers provide pricing on a per-participant basis, or in ranges, and these will be included in the contract. *For example:*

<u># of Paying Participants</u>	<u>Price per Participant</u>
10	\$ 2,850
12	\$ 2,740
14	\$ 2,580
16	\$ 2,490
18	\$ 2,420
20	\$ 2,360
22	\$ 2,320
24	\$ 2,300
26	\$ 2,230

If there is a firm number of participants in the contract that the Travel Course does not meet, it will void the contract and the Travel Course will be canceled. Similarly, if there is a firm number in the contract, it will limit you to recruiting only the number of participants listed in the contract.

Faculty-Led Travel Course Handbook

Participant Registration

After the final budget has been approved, the CGE staff notifies the group participants of their final participation cost. The CGE registers each student on the appropriate Travel Course through PeopleSoft. Students are billed for the number of credits gained from the course. Once the participants are registered in PeopleSoft, Canvas is automatically generated from the information entered through the Registrar's office. Canvas will appear in the faculty's Canvas account. Canvas information auto-fills when the students are registered after the tenth of November or April, and no earlier. Please contact [Educational Technology Services](#) for assistance with questions regarding the Canvas process.

Matriculated Students: Students who have matriculated at Chapman University need to enroll in a Travel Course either For Credit or as an audit. The Travel Course Faculty Leader/s approves Chapman students to participate in their Faculty-Led Travel Course for Chapman credit. Prior approval from the Vice Provost of Undergraduate Education is required for any Chapman student who plans to audit the Travel Course. The Faculty leaders are responsible for soliciting approval from the VP of Undergraduate Education for each auditing student. If a student took the Travel Course previously and wants to take it again a second time, they will have to be registered to audit the course. There is a fee to audit any course, but it is less expensive than tuition. Repeat Chapman students cannot pay only the travel cost fees and go with the group-- they must be enrolled in the course. Similarly, matriculated students who "happen" to be traveling in the same location as a Travel Course cannot join a course without having enrolled in the course beforehand.

Non-Students: The Travel Course Faculty Leader/s are responsible for soliciting prior approval from the Provost for all Non-Chapman Students who would like to participate in their Faculty-Led program. This might be alumni, donors, other university faculty or staff. Chapman University policy states that at least 70% of all participants must be current Chapman students, but the remaining 30% could be members of the Chapman community. These individuals may participate after faculty secure prior approval from the Provost. Students or faculty members from another university, a neighbor, an outside business associate, etc. without ties to the university will not be permitted to join.

Participant Application

Global Gateway

The [Global Gateway](#) is an online portal where students explore global education opportunities and complete application materials for Travel Courses, International Internships, and semester abroad programs. The Assistant Director, Travel Courses and International Internships will notify faculty leaders when their Travel Course is activated and available online. Faculty may direct students and other participants to the site to obtain additional information or specific details for the Travel Course and to apply.

To make it onto your official roster, participants must submit all pre-decision application materials on the Global Gateway, including:

- faculty leader authorization
- participant's digitally signed Enrollment Agreement, which will be emailed to them after receiving faculty authorization
- pay deposit through the Global Gateway
- copy of valid passport for international Travel Courses (or passport renewal/application receipt), if applicable

Faculty-Led Travel Course Handbook

For International Travel Courses: If the Travel Course is international, the participant must submit a copy of their valid passport (good for 6+ months after the end of the program). If they need to apply for or renew a passport, they must upload the receipt with the date and amount paid for passport application/renewal to their Global Gateway portal. We recommend that if you meet with students, you inform them or even require them to have proof of their valid passport or new/renewal passport receipt early on.

Once the participant completes and submits all Global Gateway pre-decision requirements, including the Enrollment and Financial Obligation Agreement, the participant is financially committed to the full cost of the Travel Course program, not just the deposit submitted.

The CGE staff will work with the participants to ensure that application materials are completed. All application requirements are due late October for Interterm and Spring Break programs, and late March for Summer programs.

Dean of Students' Conduct Clearance

All students are required to be in good academic standing to participate in a Travel Course. Disciplinary and academic records are reviewed by the Office of the Dean of Students to determine a student's eligibility on two separate occasions. The **preliminary clearance check** is conducted within a week of the closing of the Travel Course recruitment period. If due to disciplinary issues a preliminary clearance is not granted by a given date (identified by the university), the student will receive a refund for the deposit and will not be able to participate in the Travel Course.

The **final clearance check** is conducted during the last week of the semester prior to the Travel Course departure. This includes a Dean of Students' health and safety video and assessment. If a student has received a preliminary Dean's clearance but does not receive a final clearance, the student may not participate in the Travel Course and is responsible for all Travel Course program costs.

During the registration process, the CGE receives notification from Student Business Services when students have a financial hold on their student account. These holds must be resolved by the student before the student's departure. Students are not eligible for a refund if they fail to clear their hold.

Cancel for Any Reason Insurance

Cancel for any reason insurance is mandated by Chapman University for students.

Summer 2023: Insurance will be acquired from [Travel Insured](#), 1-800-243-3174. This insurance will be purchased by Chapman University after recruitment closes and the students are financially committed to their academic program.

Interterm 2024 and Beyond: Cancel for any reason insurance will be paid by Chapman University for all financially committed faculty-led students through [InsureMyTrip](#). The Center for Global Education will coordinate the purchase within the window of eligibility, 15 days after each student submits their deposit. Cancellation must be no later than 2 days prior to the scheduled departure date of the trip.

For more information, visit [Risk Management](#).

Program Administration

Pre-Departure Orientation for Students

There is a mandatory Pre-Departure Orientation video for Travel Course participants on their Global Gateway application after the recruitment period ends. All participants are required to view the video and take an assessment until they reach results of 100% to measure their knowledge and comprehension of safety, policies, and procedures while they are traveling domestically or abroad. In addition, all participants are required to watch a video from the Dean of Students that includes topics on student conduct, mental health, and personal safety abroad. Students will take an assessment and will need to score 100% on a comprehensive quiz on the material presented in the video. This is a requirement to receive final Dean's clearance.

Faculty are highly encouraged, though not required, to facilitate their own pre-departure classes/meetings for their Travel Course. This is a great opportunity to share course expectations, travel recommendations, review the itinerary, and answer questions. When creating your syllabus, you can include on-campus course meetings as part of the total contact hours to conduct pre-departure learning and preparation. A member of CGE would be happy to join those meetings as well if you would like to include details about Chapman policies, safety, and remaining application requirements.

Chapman University requires All faculty leading Travel Courses in the upcoming term, Interterm/January or Summer, to attend a mandatory Travel Course Training session at a minimum of every two years. Following a hiatus of one year or more for a Travel Course, the faculty leader (s) must attend training. Such training will be offered twice annually. The training will include, but not limited to: Harassment, Discrimination and Sexual Harassment, Mandated Reporting, Misconduct Policy, technology to maintain real-time connections with travelers, Emergency protocols, Review of University policy/ies when family members travel together on a trip, either as leaders or participants, and ensure that all faculty annually sign testifying the acknowledgement and understanding of the role of the faculty member on Travel Courses.

This training will be reviewed by the Travel Course Advisory Board on an annual basis.

Travel Course Faculty Pre-Departure Training

The Center for Global Education will hold a mandatory Contributors Panel: Training for Travel Course Faculty session where faculty will receive the most up-to-date information on their responsibilities, participant safety, and emergency procedures. Faculty will hear from:

- Risk Management
- Student Psychological and Counseling Services
- Human Resources
- Risk Management
- Student Health
- Public Safety

Faculty-Led Travel Course Handbook

Pre-Departure Forms

The Center for Global Education will send the faculty the following documents before departure:

- group members' health information
- emergency contact information
- form to leave the program early, temporarily
- form to leave the program, permanently
- CGE survey packet, if requested hard copies to distribute before the program ends

Before departure, faculty must complete and submit all required faculty forms to the Assistant Director, Travel Courses and International Internships:

- personal emergency contact(s), and phone number (s)
- on-site emergency's address, phone number
- embassy information, if appropriate

Travel Advance

Once a final budget is approved by the Provost's Financial Team, CGE will create the faculty's electronic cash advance in Concur. The request is reviewed and processed by the Office of Financial Services, Accounts Payable.

Note: If you would like to receive your Cash Advance funds via direct deposit rather than a physical check, you must set up your direct deposit with Accounts Payable for expense report reimbursements. **Please note that this is separate from your Payroll Direct Deposit.**

Complete the Expense Report Reimbursement section of the [Automatic Paycheck and Expense Report Deposit Authorization](#) form and submit it to John Van Buren or Rosie Garcia in Accounts Payable as soon as possible. Processing times may vary.

A cash advance includes per diem and related travel expenses as specified in the final budget. After the cash advance has received final approval from Accounts Payable, it is processed and the funds are either deposited directly into faculty's account if they have completed the [Automatic Paycheck and Expense Report Deposit Authorization](#) with Accounts Payable or a hard check will be printed and mailed to the faculty's address on file with Accounts Payable.

Faculty should ensure that their Concur travel advance is correct, has been processed using the Travel Course budget, and that they have received it before they depart.

Faculty should monitor their Travel Course budget frequently during travel to ensure they are staying within the budgeted amount for each category. The faculty must collect all original itemized receipts or take pictures of the detailed and total receipts to upload into Concur. To clear a travel advance, the IRS requires receipt attachments for each expense outlined in the Travel Expense Report. Once a Travel Course has been completed and the faculty member returns to campus, they have 30 days to clear their advance.

Note: If faculty's Travel Expense Report is not fully signed off in Concur within 30 days, there may be a two-year suspension from leading a Travel Course.

Faculty-Led Travel Course Handbook

International CHUBB Travel Assistance Insurance Program

Chapman University provides International Medical Insurance and Assistance Services through CHUBB Insurance Company to all members of the Chapman University community traveling on behalf of the university. The program CHUBB provides (a) medical benefits, (b) emergency medical evacuation services, (c) an accidental and dismemberment benefit, and (d) miscellaneous assistance services associated with foreign travel. Group members and faculty should enroll in the program using Risk Management's [Travel Registry form](#).



Individuals and faculty who participate in an international Travel Course are required to register for this insurance coverage. Travel Course students enroll in CHUBB Insurance with their Chapman login information. Travel Course participants who are not Chapman students must contact Risk Management for assistance with CHUBB insurance registration.

All Travel Course participants are required to maintain a domestic health insurance policy while abroad to be eligible for CHUBB, Chapman's-provided international coverage. This may be a participant's independent health insurance plan, coverage under their parents/guardians, or the Chapman University Wellness plan.

International Travel Insurance and Assistance Plan and Policy Numbers

For Faculty:

CHUBB TRAVEL ASSISTANCE PROGRAM
Organization: Chapman University
Policy Number: GLM N0495211AR
Assistance Provider: AXA Assistance USA

For Students:

CHUBB TRAVEL ASSISTANCE PROGRAM
Insured/Employer: Chapman University
Policy Number: GLM N04251738R
Assistance Provider: AXA Assistance USA

Please call when you:

- require a referral to a hospital or doctor
- are hospitalized
- need to be evacuated or repatriated
- need guarantee payment for medical expenses
- experience local communication problems
- safety is threatened by the sudden occurrence of a political or military event

For medical referrals, evacuation, repatriation, or other services please call:

CHUBB Travel Assistance Program: medassist-usa@axa-assistance.us
1-855-327-1414 (Inside the USA) / 1-630-694-9764 (Outside the USA Call Collect)

Faculty and participants should review the sections on Medical Referrals and Emergency Medical Payments. While there is no way for the document to identify every possible medical condition, travelers should always feel free to contact ACE using the phone number provided. While they may require a personal or University credit card in some cases, the university encourages all travelers to have some financial means of securing the possible liability for medical expenses. Few insurance policies these days pay the first dollar; most have a deductible and co-pay. For faculty or other travel leaders who have coverage under the

Chapman group medical plan, the Human Resource Benefits staff will help in understanding those benefits. The question of university policy regarding reimbursement falls outside the purview of the CGE and is determined by Financial Services, Account Services.

Risk Management and Participant Safety

Participant's Health Information

After the Faculty Travel Course Pre-Departure Orientation, CGE provides two full roster reports for participants' emergency contact numbers, allergies, insurance information, medications, and health conditions. This information is self-disclosed, so it may not be a complete picture of all medical concerns with participants. This information is private and confidential, so do not share this with anyone outside of the CGE, other faculty leaders, or, if required, the provider team.

Reviewing student medical concerns before departure is important to ensure that you are prepared to address concerns and issues during the program.

Critical Incident Template and Database

Should an incident occur while the course is abroad (e.g. participant illness), the faculty leaders should use the [Critical Incident Template](#) to collect and manage essential incident information for their programs and students abroad. Once information is collected, if the incident is criminal, it should be submitted to the Public Safety in compliance with the Jeanne Clery Disclosure of Campus Security Policy and Campus Crime Statistics Act (the Clery Act). The Clery Act requires all colleges and universities that participate in federal financial aid programs to keep and disclose information about crime and emergencies, on and near their respective campuses. Compliance is monitored by the United States Department of Education. An Annual Security Report is prepared by the Department of Public Safety in cooperation with Residence Life, Student Life, and the judicial affairs staff, along with information provided by the Orange Police Department.

Expulsion and Appeal Process

Because of the unique circumstances surrounding a Travel Course, the expulsion and appeal process is slightly different than it appears in the Classroom Behavior and Petitions section of Academic Policies and Procedures in [the University Catalog](#).

The faculty continues to have the authority to remove students from their class immediately. However, during the Travel Course, the faculty member will submit a written notice and rationale for the removal of a student to the student, the Director of Global Education, and the Dean of Students. Students have the right to appeal this decision, but they may not attend class during the Travel Course until after the expulsion has been adjudicated.

The Process

- 1) Within 24 hours of receiving the faculty statement of removal, the student may submit an appeal in writing to the Director of Global Education and the Dean of Students.
- 2) The appeal will be reviewed within two business days. The student cannot attend class pending the appeal decision.
- 3) If the student is removed from the course, the university will offer to make travel arrangements home, for which the student will be billed. If the student accepts these arrangements, a faculty member will accompany the student to the departure point. The student will not receive any refunds for the cost of the Travel Course fees or tuition, and any additional costs incurred for the return trip will be charged to the student's account.

Faculty-Led Travel Course Handbook

Participant Safety

When a faculty member is the sole Chapman group leader and a participant becomes incapacitated, ill, or injured in a way that prevents them from moving forward to the next planned event or flight home, the university expects faculty to:

1. Contact your provider or abroad staff immediately to get their assistance in managing the situation. Contact the CGE as quickly as possible to inform them of the situation and what has been done for the participant.
2. If the program is ending, stay behind with the participant after seeing the group on their way to the airport.
3. If your program abroad continues, work with your provider, CGE and Chapman University to provide the assistance necessary to uphold the academic rigor, safety, and health of all group members.

In case of emergencies, the CGE has prepared an emergency plan to guide faculty through low to high-risk situations during their programs. Faculty will receive this guide and are highly encouraged to review them before their program begins and keep physical copies on hand during their travels.

[Faculty-led Travel Course Emergency Plan](#)

Travel Course Participant Free Time and Leave

Participant's Free Time

Travel Courses are intense experiences, fitting a great deal of learning into a limited period. Because of the compact nature of this experience, group members are expected to remain within the Travel Course area, even during “free time”. They are not authorized to leave the environs until the conclusion of the Travel Course. Participants may stay overnight in an area outside of the contracted accommodations for the Travel Course either before the program begins or after the program ends.

Participant Asks to Leave the Travel Course Group Temporarily

In some instances, a participant may choose to leave the group temporarily before the end of the Travel Course. It is up to the discretion of the faculty to grant a temporary leave for a Travel Course participant before the program ends. If the lead faculty approves the departure, both individuals must complete the [Request to Temporarily Leave Faculty-Led Travel Course Form](#). This form reduces Chapman University's liability for the participant after they leave the group. The signed document must be turned in to the CGE and becomes part of the individual's file.

Participant Asks to Leave the Travel Course Group Permanently

If the faculty allows a participant to leave the group before the end of the program with no plans to return and both parties complete the [Request to Change Permanent Status in Faculty-Led Travel Course Form](#), the participant will receive no refund for Travel Course expenses. The faculty retains the right to assign the student whatever grade the student merits based on academic performance, including F, FW, or W.

Upon Return

Travel Course Participant Survey

A short questionnaire has been developed to evaluate the Travel Course participants' feedback on program logistics, application process, accommodations, and services provided by the program provider. The survey is anonymous. It does not address the academics of the program. The CGE will send the survey request directly to group participants during the last few days of the Travel Course.

The CGE requests that the survey be taken simultaneously by the entire group before the Travel Course concludes. The results will be compiled and shared with group leaders and the Deans of the faculty's college. The participants' ratings are used to assess planning and delivery methods for Faculty-Led Travel Courses, providers, communication, processes, and overall student satisfaction.

The CGE highly encourages faculty to participate in a debrief of the survey results upon return and when the CGE compiles the results. The debrief will provide an executive summary of takeaways in addition to the raw results and also include context from the rest of the programs and previous terms for your results.

Update Summer 2023: At the request of the Provost, the student evaluations will be sent to the Dean of the faculty member(s) leading the Travel Course.

Faculty-Led Travel Course Handbook

Faculty Reconciliation

Upon return from the Travel Course, the Assistant Director, Travel Courses and International Internships will send faculty members a customized email identifying the dollar amounts to be reconciled to clear the Travel Advance with Accounts Payable. **The university requires each advance to be cleared in Concur within 30 days of the faculty's return from the Travel Course or there will be a two-year suspension from leading a Travel Course.**

Faculty must submit their accounting and receive Final Approval from Accounts Payable for the Travel Expense Report to be complete.

All Travel Expense Reports are submitted online through Concur. Accounts Payable will conduct a preliminary review to ensure the charges, expenses, fees align with the Travel Course final budget, then the electronic report will be routed to the CGE for further review of additional charges that may apply.

When reconciling your cash advance in Concur, reference the [Travel Course Faculty Concur Quick Start Guide](#) for guidance.

To comply with IRS rules and regulations for business travel, original itemized receipts, bank and credit card statements supporting charges, and signed documentation must be uploaded into Concur. In addition to the total amount charged for a group meal, when available, **itemized receipts** must also be included for group meals.

Reimbursement for alcoholic beverages is subject to authorization by a Vice President. The University will not reimburse individuals for personal consumption unless proper authorization has been obtained. The department head should initial the actual expenditure to indicate approval. General approvals of a Travel Expense Report as a whole do not constitute approval for alcohol expenditures.

***NOTE:** Should faculty's online Travel Expense Report reconciliation submission appear in Concur after 30 days, the faculty leader may be ineligible to lead any Travel Course for two years.

Glossary

Committed: An individual who has submitted a deposit and a completed Enrollment and Financial Obligation form to the CGE will receive a committed status and will be charged for Travel Course fees. Refunds are not available unless the course is cancelled.

Contract: A written Agreement between the university and the Third-Party Provider that specifies the professional services provided for a designated number or people, in certain locations. The contract is created, sent to Legal Affairs and signed by Chapman's Executive Vice President & COO and the Professional Service Provider.

Enrollment Authorization and Financial Obligation Agreement: A customized Travel Course enrollment form that Chapman students and Non-Chapman University Participants fill out to participate in a Travel Course. Faculty give their consent to enroll by emailing the Center for Global Education.

Faculty Group Leader: The university requires that at least one Full-Time Faculty person lead the Travel Course.

Final Budget: The Preliminary budget is reconfigured using the actual number of participants, and final costs from the Third-Party provider to determine the final participant's cost for the program.

Global Gateway: CGE's online portal that houses all of the program brochures and student application and requirements for each program.

Non-Chapman University Participant: An individual who is not a student at Chapman University and still wants to participate in a Travel Course, usually for non-credit. The person could be an alum, faculty dependent, spouse, donor, or someone affiliated with Chapman University in some way. A Travel Course may be comprised of no more than 30% Non-Chapman University participants.

Participation: Chapman University requires 10+ paying participants to travel or the course is canceled.

Paying Participant: Someone willing to pay the travel fees assessed with the Travel Course program. A participant may be a Chapman University student, or an individual approved by the Provost. Administration requires 70% of the roster to be made up of Chapman students and 30% may come from an affiliation to the university and approval from the Provost.

Passport: A valid passport is required for all International Travel Courses. Each passport must be good for 6+ months AFTER the program ends. Individuals must apply for new passports, or renewal of the current one immediately to allow for possible processing delays.

Per Diem, Faculty: Faculty meals are covered when traveling for the Travel Course. The traveler has the right to accept less than the authorized per diem. At the time of final budgets, per diem is adjusted according to the U.S. Department of State rates. Faculty will not receive more or less per diem money if the rate changes after the final budget is approved. The faculty's meal receipts are not required for reconciliation.

Faculty-Led Travel Course Handbook

- For domestic travel, Chapman University System follows Internal Revenue Service rules for per diem meals and incidental expense (M&IE) reimbursement. See [Meals and Entertainment fiscal policies](#).
- [Domestic per diem](#) is based on the rate determined by the Internal Revenue Service each fiscal year for the individual city.
- For international travel, the U.S. Department of State [Per Diem rate](#) is available online. Use the “M & IE Rate”.
- Daily per diem is divided amongst meals: Breakfast 20%, Lunch 30%, and Dinner 50%.

Preliminary Budget: A budget is created using the Third-Party Provider’s proposal, along with other meals, excursions, travel not included in the professional services quote from the provider. Collaboratively, Faculty and the CGE arrive at the number of participants they will recruit for the course. This is the most important budget to include all costs and fees, since once the budget is approved by faculty, Department Chair, Department Dean, CGE, and Financial Operations, the final budget may not exceed the preliminary budget price range.

Proposal: A quote or submission received from a professional services provider, or third-party provider for requested services, in a given location, for a specific number of participants.

Receipt of Payment: Cashier’s payment receipt given to paying participants for either an initial deposit or final payment.

Third-Party Provider: Any outside organization, program provider, travel agent, university, or hotel that we negotiate with, contract, and pay to receive professional services for accommodations, classroom space, hotel/air reservations, meals, or tour guides, etc.

Travel Course: Travel Courses are short-term domestic and international programs led by Chapman full-time Faculty for academic credit during Interterm/January and summer. The course includes a travel segment, usually between one and four weeks. All Travel Courses outside the United States are approved for the [Global Study](#) portion of the 2007 GE program.

Travel Expense Report: To clear a travel advance received before departure, a reconciliation report is prepared and submitted into the online Concur financial system within 30 days of the Faculty’s return back to campus.

Tuition: Each Travel Course has academic credits attached to the program. The cost of tuition credits is not included in the Travel Course participation fees. The fees established in the preliminary and final budgets only reflect the cost of travel, not the charge for tuition credits.

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