**Education Abroad Policy Updates**

**(October 2024)**

Please find below updated education abroad policies and guidance. These sections will be added to the Education Abroad Program Development Handbook and corresponding pages of the IU Education Abroad website as soon as possible. In the event that the website or Handbook and the following policy updates differ, the policies as outlined below override previous policy.

**Program Leadership Roles, Responsibilities & Eligibility**

**Program Leader Role**

The role of a program leader is complex, even with the support of a program coordinator. Accompanying students on an educational endeavor abroad, whether they earn credit or not, entails responsibilities that may not normally be exercised in a traditional campus-based classroom situation. While the core activity of an academic program abroad is the teaching and learning that take place, additional responsibilities outside of the classroom also demand program leader attention including but not limited to: administrative and fiscal duties; managing student life issues ranging from homesickness to physical/mental health issues; and sometimes emergencies or other unexpected incidents. Handling additional non-program teaching duties, including online teaching, while leading a program abroad is generally not possible given the extended expectations and demands on time while in-country. In addition, faculty should avoid committing to significant research or service responsibilities concurrent to the program, unless they are directly related to the program. While exact responsibilities may be divided up differently from campus to campus, or from academic unit to academic unit – for example, when an office team vs. an individual faculty member is supporting a program’s logistical development and recruitment functions – the responsibilities as outlined below provide the foundation for program leader expectations.

**Program Leader Responsibilities**

Prior to the submission of a program proposal, the program leader must:

* Know the geographic and academic area well and be prepared to handle both with the IU student group.
* Have sufficient expertise in travel to recognize/anticipate the pitfalls, routes, safety concerns, and advantages the proposed destination offers.
* For-credit programs: be academically qualified to teach the course associated with the travel experience.
* Not-for-credit programs: have an area of expertise that matches the program objectives.
* Propose the program in a timely manner to their department and associated committee(s) for discussion and approval as necessary.
* Be prepared to be present with the student group for the entire duration of the program.
* Be emotionally and physically prepared to deal with the 24/7 presence of an assortment of students and their varied concerns and needs.
* Be prepared to deal in a timely and patient manner with the steps and issues involved with bringing about the faculty-led program from planning through final evaluation: academic issues, financial issues, personnel issues, student issues, etc.
* Be prepared to submit to the Overseas Study Advisory Council a complete program proposal approximately 12 months prior to program departure.

During the development and execution of the program, the program leader must also:

* Be responsible for the academic program, teaching students, and evaluation and assessment.
* Endeavor to use an Education Abroad recommended logistics provider, or a knowledgeable, reliable and compatible travel agent that has been thoroughly researched and can meet the needs of the program. In some cases an overseas partner institution or organization may serve in this capacity. Seek comparative price quotes, examine prices, and consider alternatives in order to keep the program fee financially feasible for students.
* Work with their unit’s fiscal officer to develop a financially sound program budget which ensures that all program related expenses are adequately covered.
* Work with the business manager from their department/school to monitor the income and expenses associated with the program in accordance with University fiscal policies.
* Support student recruitment by marketing the program on campus and potentially to other campuses, for example: participating in Education Abroad campus events; conducting in-class presentations and informational sessions; posting flyers and on social media; developing program descriptions for the web, etc.
* Be prepared to submit all necessary paperwork, as outlined in the Program Development Timeline, to Education Abroad by the posted deadlines.
* Be responsible for managing student issues – including mild homesickness, acute emotional distress, minor or major health issues, physical or sexual assault, accidents, thefts, and other unexpected incidents – and respond to crisis situations.
* *If the airfare is included in the program fee*, and thus the international flight is part of the formal program, at least one program leader (faculty or staff) member must ensure that all participants make their way to the departure airport abroad and board the plane. In such cases, it is advised that at least one program leader return with the group whenever possible.
* Designate a program assistant or a contracted on-site staff member to provide back-up assistance in the event of an emergency abroad.
* Be prepared to stay behind with a student who is unable to travel on with the group or return to the US, and/or have plans in place to support the student as outlined in the Health, Safety and Security Plan.
* Adhere to all policies, procedures and deadlines as outlined in the Program Development Handbook.

**Program Leader Eligibility**

For credit-bearing experiences, the faculty member proposing and leading the overseas program will be teaching in their recognized field of expertise. If a faculty member wishes to propose a program with a focus outside their recognized field of expertise (or if an administrator wishes to develop a program), they must partner with a faculty member capable of teaching within the proposed subject area. This faculty member will be responsible for the academic component of the program.  Likewise, if a faculty or staff member wishes to propose a non-credit program, they must have expertise that aligns with and supports the program objectives.  Program leaders should have a deep knowledge of the intended destination, including cultural and geopolitical knowledge, and ideally familiarity with the local language.

Adjunct faculty, part-time faculty, or professors emeriti may lead programs abroad provided that they have obtained the support of their department chair and dean prior to proposing a program. In addition, the sponsoring academic unit must ensure there is an appropriate, contractual relationship in place between the individual and the University. The individual must be officially employed by IU for the duration of the program, and be prepared and qualified to manage the range of program leader responsibilities.

**Program Coordinator Role**

When one program leader is leading an overseas program, they must designate a program coordinator or a contracted, local, on-site staff member to provide back-up assistance in the event of an emergency abroad. When two faculty members are co-leading a program, they serve as each other’s back up (and therefore no additional program coordinator is required). It is the responsibility of the sponsoring unit to ensure that the designated program coordinator meets the requirements of the job description and qualifications as described below, and that there is an appropriate, contractual relationship in place between the individual and the University for the duration of the program. Non-exempt/hourly staff may not be appropriate to fill this role given the limitations to their working hours. It is advised that University policy governing non-exempt staff and hourly employees be consulted well in advance.

**Program Coordinator Responsibilities**

This position serves as the assistant to the program leader prior to and during the program. To build trust, establish authority, and promote community, the program coordinator is also expected to actively engage with the student group both before departure and throughout the program. Duties generally include:

* Gather student information and materials
* Manage group funds and budget
* While abroad, assist with ill students by accompanying them to the doctor or hospital, or managing the student group while the primary leader accompanies the ill student
* Assist with crisis management should any emergency arise
* Serve as another point of contact for Education Abroad while the student group is abroad
* Take over the direction of the program should the leader become unable to do so
* Be “on-call” and available at all times during the travel portion of the program
* Take an active approach of overseeing students and handling a broad range of student issues that may arise
* Participate in all preparatory workshops and training conducted by Education Abroad, and the sponsoring academic unit.

**Program Coordinator Eligibility**

The program coordinator must be an IU faculty member or staff member (employment by the University is required for liability purposes).  The program coordinator should have previous travel experience (ideally international travel experience) in order to understand the demands of such travel and be able to sufficiently support students. The individual should have the ability to manage student funds and budget appropriately, as well as strong interpersonal, communication, organization, and leadership skills and the ability to handle emergencies and other student behavior issues as they arise.  Previous knowledge of crisis management and experience traveling with student groups and/or working with students one-on-one is preferrable.

Departmental support for participation is required.  A highly qualified graduate student may also serve as a program coordinator, provided they are employed in some way by the University for the duration of the program. It is expected that such appointments are reviewed by the sponsoring unit on a case-by-case basis and are dependent on the graduate student’s background (e.g. level of maturity and confidence, ability to manage a group, familiarity with program destination, etc.) and the program structure.

In general, it is important that the faculty or staff members who commit to serve as on-site program staff realize the extent of the responsibility they have taken on through this process. The faculty member’s academic unit should be prepared to assist them in preparing to respond to a crisis. Indiana University will protect and defend the faculty/staff member if their actions are in consonance with institutional expectations, should a crisis occur. The staff of IU Education Abroad is available for guidance and advice during moments of crisis. The office will bring in the expertise of other units such as the Dean of Students or Counseling Services, as appropriate, to respond to a crisis. Even with the support of the university resources, faculty must be prepared to be the first responder in any kind of situation. Decisions related to health, safety and security are made in consultation with the student’s family as well as IU administrators.

IU ascribes to best practices in these circumstances and will advise faculty or staff regarding legal requirements related to privacy issues (i.e. HIPAA, FERPA, etc.). For more information about managing emergencies, please refer to the detailed documentation provided by IU Education Abroad regarding crisis management.

**Third-Party Accompaniment on Faculty/Staff-Led Programs**

The following policy was implemented in order to prioritize student safety and their educational experience as well as take steps to reduce institutional risk - and in direct response to student feedback on post-program evaluations. Limiting participation in education abroad programs to enrolled students and those IU employees who are officially facilitating teaching and learning within the program is considered best practice in the field. Only allowing those directly facilitating the teaching and learning process to travel with the group in-country significantly decreases the risk to Indiana University. It also ensures that all who are engaged in the program are focused on the class, the students, and program activities.  As such, only the official program leader(s)/coordinator(s) and students fully enrolled in the program are allowed to travel abroad with the student group and participate in program activities.\*  Program leaders and coordinators must all be IU faculty or staff.

Spouses/partners of program leaders/coordinators are third parties. They may accompany program leaders/coordinators on the international flights associated with the program and stay with program leaders/coordinators in program accommodations. However, as third parties, they may not accompany program leaders/coordinators during any formal or informal program activities, which include but are not limited to: in-country travel; excursions; guest speakers or networking events; visits to organizations, businesses, or service sites; and instructional sessions. Such third parties are to refrain from contact with students; program leaders/coordinators are responsible for ensuring this. Third parties cannot represent IU in any official capacity. Minors and dependents are not allowed to accompany program leaders/coordinators.

For a spouse or partner to accompany a program leader/coordinator on an international flight and/or stay with the program leader/coordinator in program accommodations, the program leader/coordinator must obtain advanced written approval from the dean of the academic unit. Once approved, these individuals must also complete the appropriate agreement and release form\*\* and submit it to the dean of the academic unit or their designee as well as to IU Education Abroad (edabroad@iu.edu). Such waivers must be retained for at least three years.

The following rules and requirements shall apply when a spouse or partner accompanies a program leader/coordinator:

**Financial Considerations**

* Indiana University cannot financially support the accompaniment of a spouse or partner of a program leader/coordinator in any way (beyond the spouse or partner being permitted to stay with the program leader/coordinator in program accommodations).
* Travel costs and living expenses for a spouse or partner of a program leader/coordinator must be covered by that program leader/coordinator or the spouse or partner themself.
* Indiana University has no obligation to make arrangements for the accompanying partner or spouse during the program, including but not limited to the provision of travel, housing, or meals.

**Impact on Program Activities**

* The program leader/coordinator who is having a spouse or partner accompany them is responsible for ensuring that the spouse or partner does not negatively impact the experience of any program participant.
* The program leader/coordinator must make all necessary arrangements for the spouse or partner to ensure that the program leader/coordinator is able to fully perform their professional responsibilities with the program.
* Program participants must not be put in a position of having any responsibility for accompanying individuals.

**Health and Safety**

* The program leader/coordinator, and spouse or partner, must understand and accept the risks of the arrangement, including the inherent risks of foreign travel.
* The program leader/coordinator must ensure that the spouse or partner has adequate health and accident insurance, including evacuation and repatriation coverage.
* Further details on the obligations of the program leader/coordinator and the spouse or partner can be found on the required agreement and release form.\*\*

This policy applies to all faculty/staff-led programs. Failure by the program leader/coordinator or their spouse/partner to adhere to this policy, the terms of the companion agreement and release,\*\* and other applicable IU policies may result in termination of the program leader/coordinator’s position with the program.

\*Note: Vendors, university partners, alumni, and guest speakers who meet with the group in country *for a limited time* and *provide a specific activity* for the program, such as guest lectures, organizational visits, dinners, or tours are considered part of the itinerary’s programming.

\*\*Companion (Adult) to IU Personnel Agreement and Release

**Student Housing Abroad**

Program leaders have the responsibility for ensuring that student housing is located in safe neighborhoods abroad and that such housing complies with basic emergency, safety and security measures. This includes ensuring that accommodations are equipped, for example, with smoke alarms, multiple avenues for egress, etc. should an emergency arise. Generally speaking, licensed facilities such as hotels, motels, and hostels must comply with local safety ordinances. AirB&B rentals and similar types of private rental housing may not and are therefore discouraged. In the case of host families, the program leaders must take steps to ensure that the host families have been appropriately vetted in advance, which typically includes at minimum an interview with all the host family members and a survey of the space in which the student(s) would live. When working with a logistics provider, on-site organization, or other entity to secure student housing abroad, program leaders should use this policy as a foundation for communicating what is expected of those vendors.

Indiana University also requires that sleeping arrangements provide for a separate bed for each program participant.

Single gender housing is not required; however every effort must be made to ensure that students are comfortable with their housing assignments. As a general practice, program leaders assign housing based on the gender listed on the student’s passport and/or IU student record, then allow for adjustments based on student requests. It is advised that program leaders have preemptive conversations with their students and let students voice who they wish to live with. It is acknowledged that some local cultures are more conservative and won’t allow unmarried, mixed gender room assignments. In such cases, it is the responsibility of the faculty leaders to understand the context ahead of time and convey this to their students.

It is also expected that there will be locks on students’ rooms as a method of securing the space both while students are away as well as when they are inside the room. If the nature of the program housing is such that this is not feasible, for example on a field-based program where students are housed in group tents, then it is the faculty leader’s responsibility to ensure students are clearly made aware of the accommodation arrangements in advance of enrolling in the program. In these situations, a ‘safety in numbers’ approach is recommended, where students have their own bed (sleeping bag, mat, cot, etc.) and share the space with those they feel comfortable.  Students should also be advised that they consider bringing a personal alarm, emergency door stop alarm, etc. to secure their space while in their rooms or when sleeping.