



FLP Program Leader Handbook

The information provided in this document is intended for informational purposes only and is subject to change. Information may be changed or updated at any point. SAA may also make improvements and/or changes in the protocols, policies and/or the programs described in this handbook at any time. The SAA will strive to provide timely notice of any and all changes as they occur.

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About Study Abroad and Away

College of Professional and Global Education Mission & Vision

The Study Abroad and Away office is housed within the College of Professional and Global Education. In the College of Professional and Global Education at San Jose State University, we provide access to relevant educational programs that allow individuals to gain knowledge and skills that create a solid foundation for them to be engaged and productive members of a global society. We offer a learning environment that is dynamic and innovative, ensuring that we are responsive to the ever-evolving workforce and industry demands. Our college is the nexus for connecting professionals, institutions, businesses and industries, locally and from around the world, to the knowledge, resources and talents of Silicon Valley's premier public university.

We aspire to be the College that shapes the future of the workforce of Silicon Valley and beyond, preparing students for professions that exist today and those that have yet to be created. We will be recognized as a leader in international education, leveraging our diverse international population and strong portfolio of institutional programs and partnerships to advance our commitment in preparing students and scholars to live and lead in a global society.

Study Abroad and Away Mission

The Study Abroad and Away office supports San Jose State University (SJSU) and the College of Professional and Global Education in developing accessible and academically focused cross-cultural programming for all SJSU students. We aim to foster global competencies in our students and scholars through innovative programming and through the development of targeted, mutually beneficial partnerships with institutions, agencies (governmental and NGOs) and companies that share and support the globalization ethos and the University's priorities and values.

Study Abroad and Away Contact Information

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While on an active FLP, non-emergency questions and all reports go to: spartansabroad@sjsu.edu

Study Abroad and Away Learning Outcomes

The Study Abroad and Away office strongly believes in the role that a study abroad or away experience can have in a student's academic, personal and professional development. Through participating in a study abroad or away program, San Jose State University students will develop knowledge, skills and attitudes that foster personal and professional growth, develop intercultural competencies and prepare them to be dynamic and productive global citizens who are deeply cognizant of living in a connected and interdependent world. Specifically, students will be able to accomplish outcomes in the following areas as a result of their study abroad or away experience:

Personal Growth and Development

- Demonstrate awareness of their own values and identities
- Adapt to new and unexpected situations and demonstrate increased tolerance for and comfort with ambiguity
- Demonstrate increased confidence in navigating challenges independently
- Develop critical thinking skills, specifically the ability to learn through observation, analysis, interpretation, reflection, evaluation, inference, explanation, problem solving and decision making

Intercultural Competence

- Describe, interpret, and demonstrate an appreciation for the differences and similarities between their home and host cultures, and within their own communities and peers' experiences
- Recognize cultural differences in verbal and nonverbal communication and begin to participate in creating a shared understanding based on those differences
- Consider the value of diverse perspectives and increase their understanding of others' worldviews and experiences
- Develop an awareness of one's own identities, privilege, biases and cultural values and how those shape their experiences in the world and interactions with others

Career Readiness

- Develop skills that are essential for participating in a global workforce, including problem solving, flexibility and collaborating with individuals from diverse cultures, experiences and perspectives
- Identify the knowledge, skills and attitudes gained during their study abroad and away experience that are relevant to the [NACE career competencies](#) and articulate them within their professional documents and career search
- Reflect on how to integrate their study abroad and away experience into their professional development and future careers

Global Citizenship and Community Engagement

- Demonstrate an increased understanding of global issues and how they connect with their local realities
- Develop the skills required to be active global citizens who engage with community and reflect on social justice issues
- Develop an understanding of the realities of privilege, inequality and diversity in relation to one's personal experience and within a global context

Global Opportunities for Faculty

There are many opportunities and pathways for SJSU faculty to be a part of the Global Spartan community. Faculty members can engage with international programs and projects, by:

- Leading a Faculty-Led study abroad program (FLP)
- Participating in international research and collaborations
- Serving as a CSU International Programs Resident Director
- Serving on the Faculty-Led Advisory Committee (FLAC)
- Working with the Study Abroad and Away department to champion existing and establish new exchange programs with international institutions.

The next section describes a few of the different types of programs that SAA offers in which faculty may be involved.

Short-Term Study Abroad Models

Faculty-Led Program (FLP)

The first type of short-term study abroad program model is a traditional FLP model, where the faculty travels with a cohort of participants and teaches an SJSU course on-site. In this model, faculty and participants live in the same accommodations, participate in group excursions, and travel from site to site as a group. Faculty travel expenses are paid for and salaries are based on the “Instructional Faculty, Special Programs” [CSU Salary Schedule, Class Code 2322 \(pdf\)](#). When developing an FLP for SJSU, this is the model we will follow. Faculty can collaborate with a foreign institution, but should not rely on that institution to be the sole provider of instruction. SJSU faculty are expected to provide instruction to SJSU students, which can complement a lecture or classes provided by the foreign institution or team-teaching with a faculty member from the foreign institution. In all cases, SJSU faculty are required to teach on an FLP.

Direct Enrollment/Summer School Abroad (SSA)

A direct enrollment program looks more like a traditional semester-long study abroad program, where participants stay in residence halls or dorms (where available) and enroll in a host institution’s summer school program and take courses offered by the partner institution. At SJSU we offer these types of programs as an SSA experience. SSA programs operate without an SJSU faculty member accompanying the participants on their program and are developed and managed solely by the Study Abroad and Away Office.

Faculty teaching at a foreign Institution (not an FLP)

Faculty can identify teaching positions abroad as a visiting faculty member for a summer or winter session program. This type of arrangement is between the SJSU faculty member and the foreign institution, and is not facilitated through Study Abroad and Away. If a faculty member is teaching for a foreign institution during the summer or winter session, SJSU will not pay the faculty member a salary or a stipend. The SJSU faculty member should coordinate directly with the foreign institution and negotiate their contract/package (salary, housing, etc.) directly. SJSU will not cover any expenses related to these visiting scholar positions.

Faculty-Led Programs Overview

This handbook provides guidance on the first global opportunity mentioned for faculty - leading a Faculty-Led study abroad program (FLP).

The Basics of an FLP

The Study Abroad and Away office provides expertise and assistance to faculty in developing short-term credit-bearing programming for our students that have a cross-cultural focus and provide an experientially-based vehicle for teaching SJSU courses domestically and internationally. If you are interested in developing a program that will offer courses for credit during the spring, winter or summer breaks – we can help! Please contact the Director of Study Abroad and Away to discuss your idea and learn about how we can facilitate your program.

Study Abroad and Away does offer co-curricular Alternative Break Programs domestically and abroad. These programs focus on cultural immersion and community engagement, and often include a service-learning project to engage with the local community. The Alternative Break Programs offered through Study Abroad and Away focus on learning about local cultures. They are not discipline-specific and do not offer academic credit.

If you are interested in developing a co-curricular program that highlights or focuses on an academic area in your discipline but does not include cultural immersion as a key element of the program, please work with the Associate Dean of Undergraduate Education and your college Dean's office to develop a field trip or alternative spring break through your college.

Academics

In accordance with [CSU Executive Order No. 1081 \(Appendix A\)](#), FLPs must be credit-bearing programs that take place during the special session programming window (summer, spring break, or winter). FLPs cannot be embedded into the regular session (either as a free-standing experience or as part of a regular session course¹). FLPs typically offer 3-6 units. Each unit requires a minimum of 15 contact hours of instruction, or approximately one credit unit per one week of travel. Faculty Affairs also dictates that faculty cannot offer more than 1 unit per one week of instruction. Therefore, faculty running an FLP must incorporate coursework that occurs on campus before and / or after the FLP to ensure we are in accordance with WASC and Faculty Affairs requirements. These on-campus course meetings can occur during the regular spring or fall semesters, as long as they take place on *off-duty days* (so as to not overload the faculty member).

Programs must have a clear academic focus and learning objectives. Excursions should be relevant to the course subject and academic content of the program (FLPs are not intended to be travel tours, vacations, or trips focused on tourism). The FLP course(s) must currently be in the SJSU course catalog. Additionally,

¹ Faculty can discuss developing an embedded study abroad experience into a regular session course with their academic department or college. These embedded courses are not offered by Study Abroad and Away.

there are special considerations for SJSU Studies courses, see <https://www.sjsu.edu/general-education/faculty/ge-guideline.php>.

Location

FLPs often take place in a country where the program leader has some previous travel, study, research, or teaching experience. However, a new site can be developed if it speaks to the course to be offered by conducting a site visit or working closely with a study abroad service provider. Sites must play an integral role in the course and should be selected with intention. The program should engage in the host environment and with the local culture. SAA is always reviewing the FLP portfolio and is eager to collaborate on developing new programs in underrepresented site locations.

On-site Duration

The duration of the program should be determined by the amount of time necessary to adhere to the number of units being offered. A typical program length consists of at least two weeks on site, 14 days not including travel time to and from the host destination. Programs that are less than two weeks in length are possible, but need to be approved in advance by the Director of Study Abroad and Away. Keep in mind there may be a need to teach on campus, before and after the travel portion of the program to adhere to WASC and Faculty Affairs protocols. Guidance in determining the length of your proposed FLP can be facilitated by completing the Credit Hour Compliance Worksheet, which is one of the required components in the FLP proposal. You view the [guidelines for how to calculate contact hours here](#).

Budgeting and Enrollment

FLPs are completely self-supporting. This means that the tuition, administrative fee, and program fee that comprise the total program cost are completely paid for by the participants. In order for a program to be financially viable, program leaders must meet the determined enrollment as identified when developing the FLP budget. Program leaders are expected to research and gather programming prices and costs when developing their FLP proposal to be provided when the actual program budget is developed with SAA. To be good stewards of participant money, faculty expenses (including, but not limited to meals, hotels, and transportation costs) need to be based on actual on-site costs that are reasonable and economical, and not tied to the U.S. Department of State Foreign Per Diem Rates. Only expenses which have been budgeted for will be reimbursed and any budget deficit that is incurred must be covered by the program leader and/or their college. Study Abroad and Away reserves the right to deny programs that would be considered too expensive for students. As program costs can vary due to length of time abroad, number of units offered, and the local cost of living, we will assess the feasibility of the program when developing the budget. Generally speaking, we will not offer a program that exceeds \$5,500 per participant.

Participants

Typically FLPs should accommodate 12-20 students, depending on staffing and program model. Programs must have a minimum of 12 students to run. If two faculty members are co-leading an FLP, the minimum

number is 16 students. Some programs can accommodate larger numbers, but this should be discussed with SAA at the budget meeting. The key is to make sure that projected enrollment is realistic and attainable. Program budgets are based on the minimum number set for the program. If programs do not reach their minimum number for enrollment, they will be canceled.

Program Leaders

SAA suggests having one faculty Program Leader (PL) for every 8-16 participants on the program. A program leader may consider utilizing an assistant on the program. SJSU graduate students, employees (with supervisor approval), faculty, or external experts (someone with specific language skills or depth of experience in the field) may be able to assist in the management of an FLP, but must be processed as an SJSU volunteer in advance in order to budget for their travel expenses, process the required University Personnel paperwork, and to secure the required insurance. These assistants are not compensated above the cost of travel, accommodations, and other on-site program related expenses. Faculty proposing an FLP that would like to have a volunteer appointed to assist with their program need to discuss this in the proposal phase and before the budget is finalized. Not all requests to employ a volunteer will be approved. The costs associated with supporting a volunteer is shouldered by the students, and the actual needs of the program will be assessed on a case by case basis to ensure we are not increasing the financial burden on the students without a clear purpose and need.

There can be two faculty leaders on an FLP if the program will support a larger cohort of participants (16+) and the budget can support a second faculty member and the program cost per participant is still feasible and affordable. There is no guarantee that two faculty members will be approved to co-lead an FLP. It is uncommon to have two faculty leaders run a program, especially if it is a new program.

Any desire to run a program with two program leaders needs to be discussed prior to developing an FLP proposal and approved by SAA. Common considerations to be reviewed include the need for a second program leader, the role the second faculty leader will play, the increase in costs to the program (paid by students), and the estimated enrollment for the program. SAA reserves the right to determine if a program will be run by one or two faculty members. If it is determined that the program can support a second faculty leader, the compensation distribution must be determined during the budget development meeting. Please see more details about multi-leader compensation distributions in the compensation section that follows.

All program leaders or assistants are expected to travel (in the same town or city) and stay with participants (in the same lodging facility when possible or within close proximity when it is not) throughout the entire course of the program. **Due to liability reasons, family, friends, or children of the appointed faculty and/or the registered participants cannot accompany, participate on, nor travel alongside an SJSU FLP.** Only the appointed program leaders (and in some cases, approved volunteers) and properly registered participants may travel with the program. Community members and non-students can apply to and participate in an FLP, as long as they are registered for a course, participate as a student on the program, and are not minors.

Onsite Support Policy: Starting with proposals for summer 2023, faculty proposing programs must plan to utilize one of the following options that will provide additional onsite support during the program:

- 1) Utilize a service provider / vendor with an in-country support team for 24/7 assistance.
- 2) Identify a volunteer to travel and be present with the group for the entirety of the program
- 3) Have a faculty co-leader

This is to ensure sufficient support for students and program leaders when it comes to supporting the health and safety of program participants.

Additionally, Program Leaders need to identify a back-up program leader for emergencies. This back-up person needs to be someone qualified and available to teach your course in the case of an emergency. If you have any questions or concerns about this requirement, we are happy to meet with you and discuss what this could look like for your program. Please reach out to us at spartansabroad@sjsu.edu to request a meeting **before** submitting your proposal.

Faculty Compensation

Program leaders are compensated for leading FLPs through participant tuition fee-generated funds. Program leaders' travel, accommodations, and on-site program related expenses during the program are covered by participant-generated program fees, and therefore must be based on actual on-site costs that are reasonable and economical, and not tied to the U.S. Department of State Foreign Per Diem Rates. Faculty teaching an SJSU course on-site will receive a salary based on the "Instructional Faculty, Special Programs" [CSU Salary Schedule, Class Code 2322 \(pdf\)](#).

Compensation is determined based on the rank of the faculty member, the number of registered participants and the number of units being taught; therefore, the amount of salary to be paid cannot be determined until all participants have registered in the program course and have paid the program fees (including tuition) in full.

When two faculty members are leading an FLP, the compensation will be determined as follows:

- 1) If each faculty member is teaching a course on their own, they will be compensated for the number of participants enrolled in that specific course and by their rank on the salary schedule.
- 2) If the faculty are co-teaching a course, they will split the salary (course units divided 50/50) between the two faculty leaders. Compensation will be based on the number of enrolled students in the course and on the faculty member's ranking in the salary schedule.

NOTE: Faculty teams cannot offer more than a single section of a course on an FLP, e.g. if 20 participants register for MCOM 180 (3 units), there will be a single section of MCOM 180 offered and the salary will be divided evenly (1.5 units per faculty leader) between the two faculty leaders.

Program Leader Eligibility

All levels/ranks of faculty, as well as staff with regular teaching duties, can be an FLP Program Leader. Additional eligibility requirements include the following criteria:

- The faculty member must have completed one year of service with SJSU at the time the proposal is submitted.
- Faculty should be on-campus and available to administrators and participants throughout the academic year.
- Faculty who are committed to following CSU, SJSU, CPGE, and SAA policies, procedures, and processes. If the faculty member does not adhere to policies while preparing for or while running an FLP, the SAA reserves the right to deny any future proposals to run an FLP.

SJSU has invested significantly in FLPs as a means to internationalize the curriculum as well as the faculty and staff of the university. On rare occasions, retired faculty, emeritus, and non-SJSU employees may be appointed to serve as an FLP leader because of specific programmatic needs or expertise. Faculty participating in the FERP program cannot run an FLP. Non-SJSU Program Leaders and volunteers must undergo a background check like all new SJSU employees. Once appointed, non-SJSU Program Leaders receive an SJSU login/email address.

Information regarding FERP, volunteers, and student program assistants can be found in the sections in this handbook titled, “Program Leader Eligibility and Appointment” and “Program Leader Staffing and Compensation.”

Program Leader Skills & Responsibilities

While FLPs are SJSU programs, directing an FLP is obviously very different from teaching via traditional means in a classroom. Program Leaders must successfully manage all details of traveling with a group of participants such as logistics, group dynamics, safety and security, back-up plans, and of course - teaching.

As a Program Leader, faculty will be responsible for the following:

- Marketing the FLP and recruiting students to participate.
- Reviewing participant applications within the designated timeframes determined by SAA.
- Conducting pre-departure meetings with participants to provide detailed information about the course(s), a site-specific orientation for the host destination, and any other additional relevant information. Participants must also complete an online orientation course and attend any general pre-departure meetings provided by SAA.
- Attend financial training and risk management training on an annual basis. This is required for all Program Leaders.

- Travel abroad to the program destination(s), where the FLP Program Leader teaches an approved SJSU credit-bearing course.
- SAA also strongly encourages the program leader(s) to include ongoing reflection, and class meetings during the pre-departure, onsite and post-travel phases of the program to help participants prepare and process their experiences.

FLP Program Development

San José State University and the Study Abroad and Away office are committed to creating and supporting SJSU Faculty-Led Programs (FLP). FLPs are an exciting and experientially-based approach to offering SJSU courses off-site, both in domestic locations and around the globe. When developing a new FLP, it is important to consider many moving parts: contact hours with students to adhere to the definition of a credit hour; the safety and security of our faculty, staff, and students; the costs associated with running a viable FLP, etc.

Programs may be developed by working closely with a pre-approved education abroad provider or an institutional partner, which can take a significant amount of time to plan. For those with significant experience in the proposed host location, a program can also be entirely self-designed. New FLPs can use providers that have not been pre-approved, but please keep in mind developing new provider contracts can take several months longer than working with a pre-approved provider. **Faculty considering the development of a new FLP need to meet with the Director of SAA to discuss their ideas and vision prior to developing an FLP program proposal.**

SAA, in partnership with SJSU academic colleges and departments, facilitates and develops FLPs for SJSU students. FLP proposals should originate with faculty and should carry the endorsement of appropriate departmental and college administrators.

All new FLP proposals will be reviewed by the Faculty-Led Advisory Committee (FLAC), composed of SAA staff and SJSU faculty.

New Program Development Requirements

To develop a new FLP, one of the following must be completed (as of 5/17/16):

- 1) A site visit* will be required for anyone proposing to start a program in a location where they have little to no experience *and* will not be working directly with an education abroad program provider. You can complete a site visit proposal within the Spartans Abroad Portal (SAP).
- 2) The site visit requirement **can be waived** for faculty with little to no experience in the proposed destination, as long as the faculty member(s) work with an approved education abroad program provider in developing their program.
- 3) The site visit requirement **can be waived** for faculty who have previous and extensive experience in the proposed destination and have visited the location within the past two (2) years. This

knowledge and experience must be demonstrated and documented in the New FLP Program Proposal.

All faculty developing a new FLP are welcome to complete a site visit* and apply for grant funding, regardless of their experience in the proposed destination. Information about Site Visit Grants can be found in the Site Visit Proposal Packet.

All program leaders performing a site visit* will be required to complete the FLP Site Development Spreadsheet. The FLP Site Development Spreadsheet will be provided to faculty upon approval to conduct a site visit.

***NOTE: Site visits are currently on hold until further notice.** Please contact the Director of Study Abroad and Away, Parinaz Zartoshty (parinaz.zartoshty@sjsu.edu) to discuss program proposal development without conducting a site visit.

Eligibility

New FLP Program Proposals will be accepted from all levels/ranks of faculty, as well as from staff with regular teaching duties.* Preference will be given to proposals meeting any of the following criteria:

- A faculty member who has not previously taught or led a program off-campus or abroad
- An experienced faculty program leader developing a new destination
- Proposals that demonstrate and incorporate the [Study Abroad and Away Learning Outcomes](#)
- Courses with an interdisciplinary focus
- Support from the home department to promote and demonstrate the department's commitment to internationalizing its curriculum
- Courses that integrate into the departmental curriculum (i.e. count towards a student's major in that department as either a requirement or an elective) and will be sustainable and recurring
- Courses in locations where SJSU study abroad courses are underrepresented (ex: Africa, Middle East, Australia, New Zealand, Central America, South America, Eastern Europe, and the United States)
- Development of sustainable programs running for several years (planning for the sustainability of the program should be outlined in the proposal)
- The faculty member must have completed one year of service with SJSU at the time the proposal is submitted.
- Faculty who are committed to following CSU, SJSU, CPGE, and SAA policies, procedures, and processes. If the faculty member does not adhere to policies while preparing for or while running an FLP, the SAA reserves the right to deny any future proposals to run an FLP.

* Faculty in the FERP Program are not able to lead FLPs. You can find more information on FERP and CPGE programs [here](#).

Site Visits

Instructions for Applying to Conduct a Site Visit

NOTE: Site visits are currently on hold until further notice. Please contact the Director of Study Abroad and Away, Parinaz Zartoshty (parinaz.zartoshty@sjsu.edu) to discuss program proposal development without conducting a site visit.

You must schedule and meet with the Director of Study Abroad and Away to discuss your proposed program, prior to completing the FLP Site Visit Proposal Packet.

To apply to conduct a site visit please submit:

1) *A Site Visit Proposal Application Form* ([Form B](#)), which requires the following additional documents;

- A tentative itinerary for your site visit.
- A proposal narrative describing what you intend to investigate during this site visit and what you plan to accomplish.
- A brief course narrative outlining the course you would like to teach, as well as the learning goals and objectives you plan on accomplishing during your FLP.

2) *A Statement of Support* - Share your site visit proposal with your Department Head or Chair (and Associate Dean for faculty in the College of Humanities and Arts). Each proposing faculty member must have their Department Head or Chair (and Associate Dean for faculty in the College of Humanities and Arts) complete and sign the Statement of Support ([Form G](#)).

3) *The FLP Site-Visit Grant Application*, if seeking grant funding ([Form C](#))

Those approved to conduct a site visit must submit a New FLP Site Visit Development Form (to be completed on-site) upon return from the site visit. The FLP Site Visit Development Form highlights important areas to consider in exploring the viability of a new FLP. These include logistics (lodging, transportation, meals, activities, and excursions), academic and cultural components, safety and security, anticipated costs, sustainability, etc.

Site Visit Grants

Site Visit Grants awarded will be for site visits carried out a year before the program is proposed to be offered. Faculty performing site-visits should plan their site-visit around the approximate timeframe in which the proposed FLP will run.

Completed site-visit proposals for planned programs are subject to a review process (which may include follow-up discussions and revisions between the proposing faculty and FLAC) prior to final approval.

A travel grant will be available for faculty who have been approved to carry out a site-visit. Grants up to \$2000 will be awarded per approved site visit. Faculty will be expected to secure additional funding from

other SJSU sources, such as department or college funds, or private (e.g. development) funds. If additional funding is unavailable through departments, college funds, or private funds, faculty are invited to complete the New FLP Program Proposal using methods 2 or 3 as listed above. Site Visit Grants will not be available for existing FLP programs expanding upon or changing destinations.

Site Visit Grant Guidelines

Programs may be developed by working closely with a pre-approved study abroad provider, institutional partners, or they can be entirely self-designed (for those with significant experience in the proposed host country). New FLPs can partner with foreign institutions, but please keep in mind developing new institutional contracts can take several months longer than working with a pre-approved provider.

SAA, in partnership with SJSU academic colleges and departments, facilitates and develops FLPs for SJSU participants. FLP proposals should originate with faculty and should carry the endorsement of appropriate departmental and college administrators.

All new FLP proposals will be reviewed by the Faculty-Led Advisory Committee (FLAC), comprised of SAA staff and SJSU faculty.

- 1) The site visit requirement can be waived for faculty with little to no experience in the proposed destination as long as the faculty member(s) work with an approved study abroad program provider in developing their program.
- 2) The site visit requirement can be waived for faculty who have previous and extensive experience in the proposed destination and have visited the location within the past 2 years. This knowledge and experience must be demonstrated and documented in the New FLP Program Proposal.

The site-visit grants awarded are non-renewable and final amounts will be determined by the Faculty-Led Advisory Committee (FLAC). Awards are made to help offset program development and international travel costs for university faculty and staff. Airfare or other travel requests must be economical and realistic. Meals, hotels, and incidental rates need to be based on actual on-site costs that are reasonable and economical, and not tied to the U.S. Department of State Foreign Per Diem Rates.

The following funding requests will NOT be considered:

- Retroactive funding of trips already taken or currently underway at the time of the announcement of awards.
- Trips for the sole purpose of attending or presenting a paper at an international conference or trips for research purposes.
- Proposals requesting funding that focus on developing exchange partner programs or other non faculty-led programs. The focus of the site-visit should be on FLP development. Faculty can meet with potential institutional partners on their site-visit to discuss the development of non faculty-led programs, but that should not be the focus of their visit.

In all cases, successful applicants will be expected to submit an SJSU Faculty-Led Study Abroad Program

Proposal upon their return; and, pending approval of the proposal, lead at least one iteration of the program. Priority in funding will be given to develop programs that, among other things:

- Provide affordable study abroad options for SJSU participants
- Incorporate the defined [SAA Learning Outcomes](#) into the program
- Have a projected ability to attract participants.
- Provide accessibility to participants from more than one discipline, department, or college.
- Show alignment of the proposed program with the international priorities of departments, colleges and the university.
aAre designed to be sustainable in the long-term (due to the resources involved in developing new FLPs, new FLPs are expected to run more than one cycle)
- Broaden the geographical and topical range of the existing portfolio of SJSU programs
- Incorporate a field site engagement model facilitating on-site learning and interaction with local cultures and communities.

Limitation of the Grant

The Site Visit Grant will cover travel expenses including accommodations, air and ground transportation, meals (for the faculty member), media, books, and excursions that are potential participant activities up to \$2000. The grant does not cover salary, personal items, souvenirs, or other incidental or personal expenditures. If you have questions regarding specifically which expenses are covered, contact SAA. If expenses should exceed the award amount, the faculty member will need to secure other means to cover expenses over the awarded amount.

Travel Authorization and Reimbursement Requirements

- Prior to travel, grantees must process a travel authorization through CPGE for the funding provided through the grant. SAA will provide the necessary information for submitting a travel authorization. Please reference the [Travel Authorization Submission Guide \(Appendix O\)](#) when processing your travel authorization.
- While traveling, grantees must collect itemized receipts for all expenses for which they will seek reimbursement from SJSU, and note currency exchange rates at the time of travel. For receipts in a foreign language, grantees will need to provide notes regarding purchases, including the item purchased, the amount of the purchase, the date of purchase, etc. Information regarding travel expenses will need to be entered into an [FLP expense tracking worksheet \(Appendix R\)](#), which will be submitted into the FTS system upon return.
- Upon return, grantees must initiate the travel reimbursement procedures through CPGE. SJSU and CPGE travel policies and procedures will govern all reimbursements under this program. Please reference the [Travel Reimbursement Submission Guide \(Appendix S\)](#) when processing your travel reimbursement.

After the site visit has been completed, recipients of the site-visit grant will submit the completed [FLP Site Visit Development Form \(Appendix Z.3\)](#) and other required documents (found in the [New FLP Program Proposal Packet](#)) to SAA. The Site Visit Development Form, which will be provided when the site-visit proposal has been approved, is to be completed on-site. The FLP Site Visit Development Form highlights important areas to consider in exploring the viability of a new FLP. These include logistics (lodging,

transportation, meals, activities, and excursions), academic and cultural components, safety and security, anticipated costs, sustainability, etc.

Preparing to Conduct your Site Visit

Even if you have already been to the location where you'd like to develop an FLP, or are from this location yourself, the purpose of the site visit is to evaluate the site with specific information gathering goals in mind. You'll be planning an itinerary, developing important contacts for housing, meals, transportation, gathering safety and security information, health information, academic contacts, etc. The site visit represents an important component of SJSU risk management protocols for FLPs.

The [FLP Site Visit Development Form \(Appendix Z.3\)](#), which will be provided when the site-visit proposal has been approved, is to be completed on-site. The FLP Site Visit Development Form highlights important areas to consider in exploring the viability of a new FLP. These include logistics (lodging, transportation, meals, activities, and excursions), academic and cultural components, safety and security, anticipated costs, sustainability, etc.

A detailed plan for your site visit is essential! You will have a limited amount of time and you want to make the best use of it, get the information you need, and enjoy trying out the activities you plan for participants. It is very important to personally experience as much of the itinerary as possible. First, this will enable you to make sure ideas/housing options/restaurants/museums/etc. will work both logistically and from a safety and security perspective. Second, it will enable you to describe the plans from a first person perspective to interested participants – very useful in recruiting! Third, you may find out that an activity which you believed would be great for the program is not as wonderful as you had thought before trying it out personally. For anything you are unable to try out in person, it is essential to talk with people or conduct due diligence in some other manner. It's important to do this to decrease the likelihood of unpleasant surprises when you're with your participants.

After Conducting your Site Visit

After the site visit has been completed, recipients of the site-visit grant must submit the completed [FLP Site Visit Development Form \(Appendix Z.3\)](#) and schedule a meeting with SAA as soon as possible following their return from the site visit (no later than 3-4 weeks). The purpose of the meeting will be to review what you've learned and to discuss the timeline for next steps in completing the New Program Proposal. Review the sections below and [guidelines on the Spartans Abroad Portal](#) for information about the new program proposal submission process

Developing a New FLP without Conducting a Site Visit

To apply to develop a New FLP Program without conducting a site visit, please complete the following steps:

- 1) Set up a meeting with the Director of Study Abroad and Away to discuss your vision for your proposed program, potential costs and approved program providers, if applicable. This meeting must take place prior to completing the New FLP Program Proposal application.

- 2) Identify the costs associated with your program to help develop your program budget. If you will work with a study abroad program provider or onsite partners who offer your program services, please contact them 1-2 months before the proposal is due early on to develop a proposal and to obtain a bid for your program needs, which should include proposed costs.
- 3) Speak with your department chair to obtain their support for the FLP and to discuss potential course offerings.
- 4) Complete and submit the SJSU Faculty-Led Program Proposal application for new FLPs on the [Spartans Abroad Portal](#). Review the section below for details on the new program proposal process.

Submitting a Program Proposal for a New FLP

All faculty developing a new FLP must complete and submit a program proposal on the [Spartans Abroad Portal](#). [Follow these directions](#) for navigating the online application process. The application requires the following documents:

- 1) *New Program Questionnaire*: In this online questionnaire, you will be asked to provide details about yourself, the proposed program site, academic details, site-specific considerations, program design, student support services, risk assessment and your marketing and recruitment plan.
- 2) *Risk Self-Assessment Questionnaire*: This self-assessment survey focuses on the more technical, logistical and crisis management aspects of being a program leader. The purpose is to highlight important skills required of a program leader and introduce some scenarios that may occur.
- 3) *Course Syllabus*: A syllabus for each course that will be offered on the FLP. The syllabus must conform to the accessible template according to [S16-9 university policy](#), course syllabi policies. The template can be found [here](#).
- 4) *Program Narrative*: A narrative about your program, which clearly outlines your vision. We need to see how you are connecting the program location, culture, activities and curriculum to one another. What are the goals of the program and how will you accomplish those goals? How do the goals align with the course learning outcomes?
- 5) *Student Contact Hours Worksheet*: It can be challenging to identify how a credit hour should be calculated when developing an FLP. FLPs do not always have the same elements as a course taught in a traditional classroom setting. When developing an FLP, you must be sure to provide instruction that is reasonably equivalent to the standard of combined direct instruction and student work per week, per credit hour for a semester (or its equivalent). You will need to download the [Student Contact Hours Worksheet](#) to complete and upload as a PDF. View the [guidelines for how to calculate contact hours here](#).
- 6) *Program Itinerary*: A day-by-day tentative proposed itinerary for the program, as well as a brief description of activities in the itinerary: anticipated field trips, activities, uses of host institution(s)

or other contracted instruction, etc. Please list not only your program dates, but the number of hours that you will meet with the students before and after the trip (see [sample itinerary here](#)).

NOTE: Faculty Affairs is reviewing faculty appointment forms closely and they need to see that for every 1 unit of credit, we must show at least 1 week of contact. If you are looking at offering a 6 unit course that you would teach alone, and you only plan on being abroad for 2.5 weeks, you will need to meet with the students for another 2.5 -3.5 weeks either before or after the trip (or both). You can have meetings during the preceding semester (fall semester for winter programs and spring semester for summer programs), as long as it will not impact your regular teaching duties - so off-duty days are preferred, if possible. Please note FLPs can only offer 3-4 units on winter term programs and 1 unit courses over the spring break. Use these [guidelines](#) and [worksheet](#) to determine how to calculate contact hours for your program.

- 7) *Chair's Statement of Support - Letter of Recommendation* - Each proposing faculty member will require a letter of recommendation from their Department Chair. This is a static form that will be routed to your Chair from the SAA office. Your Chair will be asked to review your proposal in entirety and verify that you are approved to proceed with your outlined plan. The Chair will complete the review after your proposal has been submitted in full. The letter of recommendation will be routed directly to the Director of Study Abroad and Away. The Director will follow up with your Chair if the approval has not been submitted.
- 8) *Marketing Materials:* The SAA staff will prepare marketing materials and develop your program's online brochure and application pages in our Spartans Abroad Portal (SAP). To prepare your marketing materials and your new online brochure, we will need the following items:
 - **Your photo(s) and a brief biography:** This should be a brief and fun description of who you are and your connection to the destination of your FLP. The photo can be a professional headshot or a fun photo that shows you in the real world.
 - **Location photos:** We need four (4) location-specific high resolution photos that will be placed on your program brochure on our website and other marketing materials. If you have no photos, please visit any **copyright-free, royalty-free websites**, such as Pixabay (<https://pixabay.com/>), to search for 4 photos to use on your program brochure. When downloading the free photos from Pixabay, please select the 1920 x 1280 pixel size.
Program title: This is meant to be used as a marketing vehicle, so it should be fun yet descriptive. Try to keep the title short, around five words. **to market the program**
 - **Program Overview:** Provide a one-paragraph description of the program experience. How would you describe your vision to an interested participant? This narrative should summarize the educational, cultural and professional implications of the program.
 - **Program Highlights:** Provide a bulleted list of what the students will experience on the program. Again, this is a marketing vehicle, so it needs to capture the interest and attention of potential applicants. Will there be a service-learning component? Networking opportunities? Hands-on experiences? Will students get to go on excursions and site visits?

Is there something unique to your destination that students may or may not be aware of? All of those pieces of the puzzle can intrigue and ultimately encourage a participant to sign up for your program. Keep in mind – students like short blurbs of text and bullet points, something that they can skim and discern quickly what is being offered, so keep it short and descriptive.

Budget Development (By Appointment) - All FLP budgets are developed with the proposing faculty member(s) and the Director of Study Abroad and Away, Parinaz Zartoshty. Upon submission of your FLP Program Proposal, please schedule a budget meeting with Parinaz Zartoshty (parinaz.zartoshty@sjsu.edu). Dates and deadlines for budget meetings can be arranged on a rolling basis.

Program Proposals for Returning FLPs

What is considered a returning FLP?:

- Any program that has run within the past two years is considered an existing FLP and should complete the FLP Returning Program Proposal.
- If the FLP has not run and/or the program leader(s) has not visited the site in more than two years, which also applies to any new destinations being added to an existing program, the faculty leaders will need to submit a New FLP Program Proposal.
- If a program was proposed in the past two years, but was canceled or did not run, the program does still qualify as an existing program. Faculty should complete and update the Returning FLP Program Proposal.

New programs should follow the steps to propose a new FLP, as outlined on the [Spartans Abroad Portal here](#).

Proposal Review

FLP Program Proposals will be accepted from all levels/ranks of faculty as well as from staff with regular teaching duties. Preference for approving a program to run will be given to those meeting any of the following criteria:

- FLPs offering courses with an interdisciplinary focus or courses that integrate into the departmental curriculum (count towards a participant's major in that department as either a requirement or an elective) and will be sustainable and recurring.
- FLPs that have reviewed the capacity, departmental/college need for the FLP, and participant interest; e.g. If there are only 40 participants needing a course in a specific major or course area, it is not feasible to offer 6 programs focusing on that major or course area, as all programs will inevitably be under-enrolled.
- Program Leaders who have proven success in marketing and recruiting their FLP.

- FLPs that have adhered to and managed their FLP budgets in past years successfully. Programs that have had consistent budgeting issues or have returned with a budget in deficit may not be approved.
- Faculty who are committed to following CSU, SJSU, CPGE, and SAA policies, procedures, and processes. If the faculty member does not adhere to policies while preparing for or while running an FLP, the SAA reserves the right to deny any future proposals to run an FLP.

* Faculty in the FERP Program are not able to lead FLPs. You can find more information on FERP and CPGE programs [here](#).

Communications with SAA

It is very important that you read (the entire email) and respond to the SAA team when they email you for information. Delays in responses can delay our ability to assist you with your program and may cause unnecessary delays in administering your program.

Submitting a Program Proposal for a Returning Program

All FLP program proposals and supporting documents are submitted online to the Study Abroad & Away office via the Spartans Abroad Portal (SAP). Returning Program Leaders are required to review the submission guidelines on here: <http://goabroad.sjsu.edu/?go=ReturningFLP>

Returning faculty are required to submit the following documents as part of their application:

- 1) *Program Application (Online)* - In this online questionnaire, you will be asked to provide details about yourself, the proposed program site, academic details, site-specific considerations, program design, student support services, risk assessment and your marketing and recruitment plan.
- 2) *Short Risk Self-Assessment (Online)* - The purpose of this shortened self-assessment questionnaire is to help SAA identify areas of risk management that you would like to learn/strengthen or areas where you may need assistance. Your responses may not impede your ability to lead a program, but will advise the SAA staff as to areas where we need to provide training to boost your skill set. We will work on providing workshops in the areas most commonly identified.
- 3) *Updated Syllabus (PDF)* - You will need to upload an updated syllabus for each course that you propose to offer on the FLP. The syllabus must conform to the accessible template according to [S16-9 university policy](http://www.sjsu.edu/senate/docs/S16-9.pdf), course syllabi policies (<http://www.sjsu.edu/senate/docs/S16-9.pdf>). Reference the template [listed on this page](#) as an example.
- 4) *Updated Narrative (Online)* - A narrative about your program, which clearly outlines your vision. We need to see how you are connecting the program location, culture, activities and

curriculum to one another. What are the goals of the program, how will you accomplish your goals? How do the goals help accomplish the course learning outcomes?

- 5) *Updated Student Contact Hours Worksheet (PDF)* - It can be challenging to identify how a credit hour should be calculated when developing an FLP. FLPs do not always have the same elements as a course taught in a traditional classroom setting. When developing an FLP, you must be sure to provide instruction that is reasonably equivalent to the standard of combined direct instruction and student work per week, per credit hour for a semester (or its equivalent). You will need to download the [Student Contact Hours Worksheet](#) to complete and upload as a PDF.
- 6) *Updated Itinerary (PDF)* - A day-by-day tentative proposed itinerary for the program, as well as a brief description of activities in the itinerary: anticipated field trips, activities, uses of host institution(s) or other contracted instruction, etc. Indicate the nature and level of contacts already made. Please list not only your program dates, but the number of hours that you will meet with the students before and after the trip(see sample itinerary in "Resources" tab).

Important to Note: Faculty Affairs is reviewing appointment forms closely and they need to see that **for every one (1) unit of credit, we must show at least one (1) week of contact** with students. If you are offering a 6 unit course that you plan to teach alone, and you only plan on being abroad for 2.5 weeks, you will need to meet with the students for an additional 2.5 - 3.5 weeks either before or after the trip (or both). You can have meetings during the preceding semester (fall semester for winter programs and spring semester for summer programs), as long as it will not impact your regular teaching duties; meetings on off-duty days are preferred, if possible.

- 7) *Chair's Statement of Support/Letter of Recommendation (PDF or Online)* - Each proposing faculty member will require a letter of recommendation from their Department Chair. This is a static form that will be routed to your Chair from the SAA office. Your Chair will be asked to review your proposal in entirety and verify that you are approved to proceed with your outlined plan. The Chair will complete the review after your proposal has been submitted in full. The letter of recommendation will be routed directly to the Director of Study Abroad and Away. The Director will follow up with your Chair if the approval has not been submitted. You do not need to facilitate this review.
- 8) *Updated Marketing Materials (Online)* - The SAA staff will prepare marketing materials and develop your program's online brochure and application pages in our Spartans Abroad Portal (SAP). To prepare your marketing materials and your new online brochure (see links below for sample brochures), we will need the following items:

- **Your Photo(s) and a Brief Biography.** This should be a brief and fun description of who you are and your connection to the destination of your FLP. The photo can be a professional

headshot or a fun photo that shows you in the real world (you can reference [our SAA staff photos](#)).

- **Program Photos:** Please pick out at least four (4) of your favorite program photos of students in action and be ready to upload them to SAP or email them to spartansabroad@sjsu.edu. Be sure they are high resolution photos that will be used on your program brochure and other marketing materials.
- **Program Title.** Submit a revised program title if you wish to change it. Otherwise we will use the same one. Remember, it is meant to be used as a marketing vehicle, so it should be fun yet descriptive. In the past we have used, “Strategy and Samba in Rio!”, “A Taste of Spain,” “Deep Dive into Japan,” “Films and Good Craic in Ireland,” “Let’s Rwanda Around,” “Guat’s up Guatemala?”, etc. Try to keep the title short, around five words.
- **Program Overview:** Provide a revised one-paragraph description of the program if you wish to change the previous program description on our website. **This is a different narrative than the academic program narrative required as part of the proposal.** How would you describe your vision to an interested participant? This narrative should summarize the educational, cultural and professional implications of the program.
- **Program Highlights:** Provide a bulleted list of what the students will experience on the program if it will be substantially different from the previous term. Again, this is a marketing vehicle, so it needs to capture the interest and attention of potential applicants. Will there be a service-learning component? Networking opportunities? Hands-on experiences? Will students get to go on excursions and site visits? Is there something unique to your destination that students may or may not be aware of? All of those pieces of the puzzle can intrigue and ultimately encourage a participant to sign up for your program. Keep in mind – students like short blurbs of text and bullet points, something that they can skim and discern quickly what is being offered, so keep it short and descriptive.

Updated Budget Development (By Appointment) - All FLP budgets are developed with the proposing faculty member(s) and the Director of Study Abroad and Away, Parinaz Zartoshty. Upon submission of your FLP Program Proposal, please schedule a budget meeting with Parinaz Zartoshty (parinaz.zartoshty@sjsu.edu). Dates and deadlines for budget meetings can be arranged on a rolling basis.

Scheduling FLP Programs

SAA works with program leaders to schedule the appropriate number and variety of FLPs each year. Some programs prefer to run annually, while others are offered less frequently. In all cases, the needs of each faculty member’s home departments and each staff member’s unit also impact the scheduling of FLPs. Please speak with your chairs and SAA early on (a few months prior to the proposal being due) regarding your plans to run an FLP in a future cycle.

Program Leader Eligibility and Appointment

Program Leaders of FLPs must get support from their Chairs (and Associate Dean for College of Humanities and Arts) during the proposal process. This is an excellent time to have a conversation about how the FLP may impact one’s workload and FTEs in the department.

Once a proposal is approved, the budget and price are set, and program marketing is on its way, SAA will send faculty the following forms (to formalize their appointment):

- [Instruction Appointment - Special Session/Winter Session Form \(Appendix Z.9\)](#)
 - Must be signed by: 1. Faculty; 2. Department Chair; 3. College Dean
 - Return the form to SAA
 - SAA will submit the form to Faculty Affairs to meet the hiring requirements. The form must be completed by anyone teaching a Special Session course (such as an FLP).
- [Class Section Add Form \(Special Session\) \(see Appendix Z.4\)](#)
 - Must be signed by: 1. Faculty; 2. Department Chair; 3. College Dean
 - This form is used by CPGE to schedule your FLP course(s).
 - Return the form to SAA.
- [Faculty-Led Program \(FLP\) Program Leader Agreement & Approval Forms \(Appendix Z.8\)](#)
 - Must be signed by: 1. Faculty; 2. Department Chair; 3. College Dean; 4. SAA Director
 - This form serves as a Memorandum of Understanding (MOU) between CPGE and the program leader; it shows that the program leader agrees to certain general conditions in regards to running an FLP and that they have approval from their Chair, Dean and the Director of SAA.
 - Return the form to SAA.
- [CSU Employment Questionnaire \(Appendix Z.11\)](#)
 - Must be completed and signed by the program leader.
 - Required by Faculty Affairs to monitor the total employment hours within the CSU system.
 - Return the form to SAA.

Appointment to lead an FLP is always contingent upon sufficient enrollment and participation in required activities such as expense training and safety and security training.

SJSU has invested significantly in FLPs as a means to internationalize the curriculum as well as the faculty and staff of the university. On rare occasions, retired faculty, emeritus, and non-SJSU employees may be appointed to serve as an FLP leader because of specific, programmatic needs. Faculty participating in the FERP program cannot run an FLP. Non-SJSU Program Leaders undergo a background check like all new SJSU employees. Once appointed, non-SJSU Program Leaders receive an SJSU login/email address and an appointment letter as described above.

FERP: Faculty in the process of FERPing are not allowed to run FLPs, per Technical Letter HR/BEN 2004-08 and pursuant to CalPERS regulations (GC 21227), “a retired person may serve without reinstatement from retirement or loss or interruption of benefits provided by this system [CalPERS] as a member of the academic staff of a California state university, if that service does not exceed, in any fiscal year, a total of 960 hours for all employers or 50 percent of the hours the member was employed during the last fiscal year of service prior to retirement.” During the period of FERP participation, both the Agreement provisions and the CalPERS regulations apply. According to HR/Benefits 2004-08, Last Updated: 2/2019: “CSU employment in summer/special session/extension is not available to participants who are employed at 50%

for the academic year (or the corresponding limit for librarians), since they already have reached the allowable employment limit.” CSU employees may, consistent with campus policies governing outside activities, be employed outside the CSU system. However, conflicts of interest are not permitted. More information regarding FERP status can be found [here](#). The above passage can be found in the [FERP FAQs](#) and in this handbook as [appendix D](#).

Program Leader Staffing and Compensation

Faculty

Program leaders are compensated for leading FLPs through participant tuition fee-generated funds. Program leaders’ travel, accommodations, and per diem expenses during the program are covered by participant-generated program fees, and therefore must be based on actual on-site costs that are reasonable and economical, and not tied to the U.S. Department of State Foreign Per Diem Rates. Faculty teaching an SJSU course on-site will receive a salary based on the “Instructional Faculty, Special Programs” [CSU Salary Schedule, Class Code 2322 \(pdf\)](#). Faculty running a Direct Enrollment style FLP and serving solely as a chaperone will receive \$300 per week stipend. If the faculty member is teaching an SJSU course in addition to the courses participants take at the partner institution, they will be paid in accordance with the [2322 salary schedule](#) (no stipend will be awarded). If a faculty member is teaching for the partner institution, SJSU will not pay the faculty member a salary or a stipend.

Compensation is determined based on the number of participants and the number of units being taught; therefore, the amount of salary to be paid cannot be determined until all participants have registered in the program course and have paid the program fees (including tuition) in full.

When two faculty members are leading an FLP, the compensation will be determined as follows:

- 1) If each faculty member is teaching a course on their own, they will be compensated for the number of participants enrolled in that specific course and by their rank on the salary schedule.
- 2) If the faculty are co-teaching a course, they will split the salary (course units divided 50/50) between the two faculty leaders. Compensation will be based on the number of enrolled students in the course and on the faculty member’s ranking in the salary schedule.

NOTE: Faculty teams cannot offer more than a single section of a course on an FLP, e.g. if 20 participants register for MCOMM 180 (3 units) there will be a single section of MCOMM 180 offered and the salary will be divided evenly (1.5 units per faculty leader) between the two faculty leaders.

Each FLP course is typically scheduled as one section in the PeopleSoft system. Only in the instance where the program is offering two different courses and students are given the option to take one or both courses, program leaders may see one of the two courses scheduled with two sections. This is due to how the program fees and tuition are attached to the course in the PeopleSoft system. Compensation is determined based on the number of participants and the number of units being taught.

Volunteers

According to SJSU’s [Volunteer Appointment Request and Appointment](#), a volunteer is defined as an

individual who performs work or provides services without compensation. A volunteer may perform a variety of functions to support the program leaders running a FLP, but may not replace the program leaders as the primary contact or supervisor for the program. Faculty Leaders cannot volunteer their time while teaching a course on an FLP.

If Program Leaders plan to have a volunteer assist with FLP projects and tasks, they will need to inform SAA prior to finalizing their FLP budget so that the volunteer's expenses can be built into the budget. A volunteer may have program-related expenses such as flight, meals, and accommodation/lodging covered by the program's available funds. Once the Program Leaders have identified the volunteer assisting the program, SAA will provide the volunteer steps to complete the required documents.

If Program Leaders plan to have a volunteer, please note the following:

- Priority will be given to SJSU faculty or staff members;
- If a volunteer is not SJSU affiliated, justification for why this volunteer is the most qualified person for this role should be included in your proposal. A strong case will need to be made for why this person has been chosen to support this program rather than an SJSU faculty or staff member.
- Any personal relationships between faculty and volunteers must be disclosed to students.
- Volunteers will be required to provide resumes and receive mandatory training.
- Volunteers will be vetted by the university and must be available to assist with emergencies, health and safety issues, and any other program support the program leader deems necessary.
- Volunteers will not receive compensation above the cost of travel, accommodations and other on-site program related expenses, and should be traveling with and/or in the same location as the group.

Program Assistants (Student Assistants)

Program Leaders may have SJSU student assistants help with a variety of administrative functions that would support the program. Student assistants should be currently employed at SJSU or will need to be provided work appointment at SJSU (typically within the faculty member's academic department). If the student assistant is currently not employed by SJSU or has not received an appointment offer at SJSU, the Program Leader will need to verify with their department for the process of hiring a student assistant.

If Program Leaders plan to have a student assistant help with FLP projects and tasks, they will need to inform SAA prior to finalizing their FLP budget so that the assistant's expenses can be built into the budget if the student assistant will be traveling with the program. An assistant may have program-related expenses such as flight, meals, and accommodation/lodging covered by the program's generated fund.

Conflict of Interest Policy

SAA is committed to being as transparent as possible with respect to financial and programmatic arrangements. Carefully review any financial transactions or other business dealings for your program.

Financial transactions or business dealings that might pose a conflict of interest must be disclosed (Political Reform Act of 1974, Government Code §§ 81000 *et seq.*). A conflict of interest exists when a faculty or staff

member's financial interests or other opportunities for tangible personal benefit may compromise, or reasonably appear to compromise, the independence of judgment with which the faculty or staff member performs his/her responsibilities at the University.

Disclosure is especially important in the event of a contract between SJSU and an outside company or organization in which you hold a significant financial or familial interest, even when you are not initiating or taking an active role in assessing or negotiating the contract.

The use of outside study abroad program providers can pose a unique conflict of interest situation. Therefore, CSU has adopted internal principles to guide its relationships with outside study abroad providers (see [EO-1022](#) and [EO-1081](#)). CSU employees are proscribed from receiving personal benefits from program providers (e.g., the payment of conference, training or registration fees, transportation or lodging costs, advertising or payment for a site visit).

Program Leaders leading an FLP may not participate in any non-FLP activities during the program, including but not limited to independent travel away from participants, family/personal vacations, receiving payment from an outside institution for coursework being taught on an FLP (when being compensated by SJSU), conference attendance/presentation or independent research that is not explicitly part of the approved FLP proposal and occurs independently and does not involve direct participation by students, etc. Faculty Leaders Program funds cannot be used for personal friends or relatives while running an FLP, they are intended to cover the travel costs of program related staff only. Violation of this policy may result in program cancellation of the FLP in question and future cycles of running the FLP.

Program Budget

Drafting a Program Budget

Once a program has been approved to run in the coming year, you will meet with SAA to develop the budget. Having reliable cost information from your research will be essential. It is imperative to gather price points for your program when developing your program proposal. Program leaders will be required to send all projected cost information to SAA prior to a budget meeting being scheduled. As part of the program proposal process, you will be asked to complete a form and outline all projected program costs, including documentation to support those estimates (ex: provider bids, screenshots of hotel pricing, flight itinerary search, etc.). SAA will not schedule your budget meeting until this form is received and reviewed. If you come to the budget meeting without program cost points ready, this could unnecessarily inflate the program costs.

Upon receipt, SAA will review the form and all the supporting information to preliminarily draft your program budget. We will then reach out to you to schedule your budget meeting, during which the draft budget will be reviewed and finalized. Faculty should expect to wait approximately 2 weeks between submitting their program cost form and/or having their program proposal approved (whichever comes later) and when their budget meeting could be scheduled. Therefore, it is in your best interest to submit this form (along with your proposal) on time.

There are two overall cost categories to keep in mind:

- 1) **Fixed costs**, which are any costs that will not change no matter how many participants you bring (this includes all costs for any and all Program Leaders)
- 2) **Variable costs**, which represent the costs associated with each individual participant.

A budget template is used to determine the overall program budget and the price per participant. It is also used to determine a target number of participants to recruit. It is an interactive spreadsheet that allows you to see how the trip price changes based on changes to fixed and variable costs, including the number of participants recruited.

The final program price must be approved by SAA before Program Leaders begin marketing an *actual* price to participants. Prior to having an officially approved final price, Program Leaders may discuss their program using a price range (but we recommend you make your price range on the high side to avoid surprising participants later). Budgets must outline any costs for which participants will be accountable that are not included in the budget sheet.

Budget Approval/Program Pricing

Once a budget is agreed upon, Program Leaders will receive an email from SAA stating the final program price, along with a PDF copy of the approved budget.

In order to support students with earlier financial planning and prevent a recurrence of high rates of attrition, **we will not open up applications for a program until the program price has been finalized.** This is to ensure that students have the most accurate information available when completing their application process. Program brochures will still be visible to the public once programs are approved, but students will not yet be able to apply until your program price has not yet been finalized. Until the price has been finalized, we will have an estimated cost available for reference (either based on a previous year or what we are projecting) with a note that this is an estimate only, as well as a note explaining that applications will be open once the price has been confirmed. **This is another reason why it will be important to submit timely documentation of your program costs, so that your program budget can be finalized as soon as possible.**

For programs in this situation where applications are not yet open, **we will include a link to a form where students can add their information if they are interested in applying.** We will then notify those students once the application has opened, as well as share that list of students with you to help with your targeted recruitment efforts.

Once established, the final approved price will not be changed. Price information affects the participant, their family, SAA, the Bursar, and Financial Aid. Because there are so many different departments involved, it is critical to have consistent information. It is also important to note there will be times when fluctuations in exchange rates or projected airfare may impact the bottom line of a given program, whether positively or negatively. It is very important that Program Leaders contribute to the sustainability of the larger FLP program by doing their best to manage costs responsibly. If exchange rates fluctuate after the

program price has been established, PLs will be asked to find ways of reducing activities to adhere to the final program price publicized (SAA can work with you in finding ways to stay on track with your budget).

SAA will inform the Bursar and Financial Aid of final program prices and they will be posted to the FLP program information on the Spartans Abroad Portal. Once this price information has been communicated, participants can start contacting financial aid about their particular aid concerns.

Publicity and Recruitment

Once you have an approved program, it's time to market it to participants. As stated above, you can start marketing as soon as your program is approved and before your budget is final as long as participants know it is only an estimated price range. As soon as you have a budget outlined and approved, applications will be open and you can begin to market your program with the actual price.

It is a good idea to talk with experienced program leaders of recent successful programs to become acquainted with their recruitment and publicity practices. If you need assistance in finding program leaders to speak with, contact SAA.

Marketing 101

Here are some great ways to recruit for your program:

PROGRAM DESCRIPTION

SAA will create a program brochure page for each approved FLP on our website. Once your program is approved, we will post a brief description of your program on your brochure page along with travel dates, the program fee, and the SJSU course being taught. When you have an itinerary written, we can also post it on your program page. This is a great way for participants to see exactly what, and where, they will be learning. We can also post testimonials, photos and any information sessions you will be hosting; please send us the dates, times, and locations of your information sessions by [completing this form](#). You can refer participants to your program's web page for information.

INFORMATION MEETINGS/SESSIONS

Hold Information Meetings/Sessions at convenient times/places for the participants you hope to attract. The purpose of these meetings is to introduce prospective participants to the general aspects of studying abroad and the particulars of your program. It is a good idea to hold *at least* three meetings each application cycle, prior to the application deadline. Meetings before breaks are especially effective so prospective participants can go home to discuss plans with their families. Please notify SAA of the dates and times for your sessions by [completing this form](#) and they will be posted on the SAA website. When possible, an SJSU participant who has already participated in an FLP can be a valuable asset in such meetings. SAA will also conduct general sessions about study abroad, which will be publicized on the SAA website. Please encourage your participants to attend.

Here is a short list of general topic ideas to cover at Information Meetings:

- Overview of the program, what participants can expect to gain and learn from participating
- What activities and events will the program include? Students expect a rigorous academic agenda, but also want to know what fun or interesting activities they will get to do while away.
- Qualifications and requirements of participants interested in participating (GPA, language prerequisites, writing directed self placement test, etc).
- Features of the program, what participants will be doing, seeing, eating, etc.
- Information about applying for the program. How to apply, what deadlines are established, forms they will need to submit, if and by when they will need to obtain a passport (encourage them to apply right away, even before they know they're accepted to a program - passport processing times can be very long), etc.
- Any additional costs the participant may incur while participating in the FLP. Providing a range of prices will allow participants to better understand what to expect.

PHOTOS/VIDEOS

Photos and short video clips can greatly enhance the promotion of your program in printed materials, at information meetings, at study abroad fairs, and on the web page. If your program is brand new, use photos/videos from your site visit or you can employ stock photos. Once you have run your program, ask participants' permission to use their best photos (they will be flattered!) and select photos of participants (identifiable as SJSU participants) in a variety of locations and in learning/intercultural settings (preferably wearing SJSU identifiable clothing). Ask participants to be cognizant of wearing clothing which identifies schools other than SJSU, although it could be their favorite t-shirt; photos with clothing identifying outside universities don't make great marketing materials for SJSU programs. Participants like to put together videos during their FLP experience and we love to have those videos on our webpage. If a participant makes a video, please ask them to remove footage of drinking and not to use music that is copyrighted.

NOTE: Be sure to take high resolution photos. See the [Travel Photography Tips guide for specific details, found in Appendix Y.](#)

SAA FAIRS

Participate in any fairs put on by SAA. There is typically a fair and/or series of events held in the fall (for summer FLPs) and in the spring (for winter/spring FLPs). Better yet, ask past participants to staff a table with you at the fairs or walk through the fairs with a QR code to your program brochure (if applicable). Have pictures, the itinerary, giveaways (candy or other food!), etc. to attract participants to your table.

NOTE: Purchases of any customized or SJSU branded items must go through specific approved vendors. If you would like to purchase anything that is customized for your program or has an SJSU brand, please

contact SAA **before** placing an order or making a purchase. SAA can help you navigate the required process through SJSU Purchasing.

CLASSROOM VISITS

Announce your program in classes. Share information about your program with colleagues who can make announcements in their classes. For example, if you're teaching a business course on your program, visit some business classes. Be sure to reach out to other departments and colleges that offer courses that have themes similar to your FLP. For example, if you are attending a Film Festival during your program, it would be a great idea to reach out to the Theater or Film departments on campus.

DISPLAY

Hang a poster or create a display to put up outside your office, on department bulletin boards, etc.

FLYERS/HANDOUTS

SAA will work with Program Leaders to design program specific digital flyers for each FLP. Pertinent information (such as a short program description, SJSU course being offered, faculty contacts, etc) will be included. Be sure to gather some colorful and fun high resolution photos to add!

PERSONAL CONTACT

Send emails or personally contact participants who are likely to find the program of interest. (Please note that SAA funds are not available for direct/bulk mailings.) Be available to counsel and assist interested participants who have questions about the program. Ask accepted participants and returnees to pass the word about your program to their friends as well.

PAST PARTICIPANTS

Involve participants who have previously participated in the program when possible, especially at information meetings. Prospective participants are very interested in hearing another participant's perspective; the testimony of past participants is one of the most effective marketing tools at your disposal!

GLOBAL AMBASSADOR PROGRAM

All returned FLP participants are invited to participate in SAA's Global Ambassador Program. This volunteer position is designed to allow participants who are returning from studying abroad to share their experiences and advice with prospective study abroad participants in an informal environment. Ambassadors provide invaluable insight to prospective study abroad participants by sharing their FLP experiences. Global Ambassadors will be responsible for marketing FLP in general, as well as their specific programs, during campus events throughout the year (Global Spartan Fair, International Education Week, Information Sessions, Pre-Departure Orientation, etc.). They are also often highlighted on SAA's social media, newsletters, and create think pieces for the SAA blog. Ambassadors are an invaluable resource to Program

Leaders, so make sure to recommend that your participants join this program! If you have an interested participant, have them email us at spartansabroad@sjsu.edu.

CLUBS AND ORGANIZATIONS

Target your marketing towards specific clubs that may have a particular interest in your program.

CAMPUS MEDIA

Use the SJSU online event calendar and *The Spartan Daily* to promote your program, or contact the campus radio station, KSJS 90.5FM.

Program Leaders should also check with their department to see what campus media outlets are available for them to advertise their program.

BENEFITS

In your promotional materials and discussions, highlight the multiple benefits a participant will receive by participating in your program...academic, intercultural, professional, personal. What bullet points might they be able to add to their resume and/or LinkedIn profile? What marketable skills will they be developing?

MAINTAINING CONTACT

Maintain lists of prospective participants including names, e-mail, address, and telephone numbers. Stay in contact periodically to determine if any perceived barriers to their participation might be eliminated. Email them with important information about upcoming meetings or interesting details about your program. Make sure you have some contact with participants before breaks. Establishing a WhatsApp or Discord group for your program has proven to be a great tool to keep accepted students in the loop with announcements.

NON-SJSU PARTICIPANTS

Consider marketing your program to other CSU schools and universities as well as the community. Focus on schools where your program could fill a gap (location, subject matter, etc.). If you feel your program may appeal to participants outside of SJSU, and are worried about finding enough participants, contact SAA to assist you in marketing outside of SJSU. Please note that SJSU participants should be your primary audience for FLPs, but adding a few non-SJSU participants is welcomed.

FACULTY COMMUNICATION - TIPS

Research into recruiting students to participate in study abroad programming shows that the primary motivator for students to sign up is faculty contact. Students are more inclined to sign up for a trip if they have repeated contact with a specific faculty member and that faculty member encourages them to look into study abroad opportunities. When meeting with students and discussing your FLP, be aware that your

messaging can make or break your trip. It is incredibly important to be positive and encouraging. If you message that the program may not get its required enrollment or that something may not be perfect, students will seek out a different opportunity that is more likely to succeed. Keep your interactions upbeat and optimistic, that will cultivate excitement and increase the chances that your program will be successful!

Application Process

Who can apply?

SJSU Students

SJSU students can apply to any faculty-led program, as long as they meet the program's minimum requirements, and are not on academic or disciplinary probation. Students must have a minimum of a 2.0 GPA to participate on an FLP, unless the Program Leader(s) have increased the minimum GPA requirement. Some programs may require upper division standing, completion of the WST, completion of core General Education courses, and/or completion of prerequisite courses. Additionally, participants cannot be minors, must be at least 18 years old, and must be Sophomore standing or higher.

Graduating/Graduated SJSU Students (Alumni)

SJSU students can still apply and participate in faculty-led programs after they have graduated from SJSU. Enrollment in the FLP after award of the degree will be categorized as Open University. Students will not be able to use the units toward their degree or toward another degree. If they plan to use the units toward their degree, they must contact their academic advisor and seek guidance in changing their graduation date so the units could be applied toward their degree.

Non-SJSU Applicants and Community Members (Open University Students)

Outside participants can apply for an SJSU FLP; this can include participants from other CSUs, other California universities, out-of-state universities, and community members not affiliated with an academic institution. All outside participants (as described above) can participate on an SJSU FLP as long as they are registered for a credit bearing course per [CSU Executive Order No. 1081 \(Appendix A\)](#), have successfully completed all required application documents, are not a minor, and are committed to attending all pre-departure meetings and orientation (either in person or via web).

Everyone traveling with or participating on an FLP *must* be registered in a credit bearing course, unless they are the Program Leader or a volunteer assisting the program leader.

SAA will review the online applications for basic requirements that the program may have, such as GPA, completion of WST, upper division standing, etc. After this initial review by our office, the program leaders will have access to review the participant applications. **Faculty must not notify applicants of their**

application decisions prior to the close of application, before the application review period has concluded, or in advance of the SAA team notifying the participants of the program leader's decisions.

For upper division General Education courses that require:

- Passing of WST (Writing Skills Test) - Open University (OU) participants must show proof of having passed an equivalent test or have taken a similar course to SJSU courses that demonstrates passing of the test.
- Completion of Core General Education courses - Program Leaders will need to check/ make judgement whether the participants are qualified to enroll in the course if there is no record of whether the participants have completed <60 units.

Open University (OU) participants will also need to complete additional documents once accepted. One of the documents include:

- Non-Matriculated, Open University, and J-1 Visa participants Taking SJSU Studies Courses for Non-GE Credit Form:
http://www.sjsu.edu/gup/ugs/students/petitions/list/Petition-NonMatrc_v2.pdf

OU participants should not complete the form above until they are accepted to the program. By completing this form, participants agree that should they ever matriculate at SJSU, they may NOT use this course for SJSU Studies credit. SAA will provide OU participants instruction on how to complete the form once they are accepted to the program.

FLP application process

PRE-DECISION PHASE

1. Applications open online on a specific date (open application dates are posted on our website and on posters around campus).
2. Applicants log into the Study Abroad Programs website (which uses the Terra Dotta software system) to apply.

Steps for participants applying to an FLP:

- Go to the FLP web page and select the program page. There will be an APPLY HERE! button on the program's page. Click on the link to be routed to the next page.
- Click on the "Apply Now" button for the program to access the application. Each program has a separate application, so it is important to access the application through the specific program page.
- Log into the Terra Dotta system using an SJSU ID number and password.
 - If a participant does not have an SJSU ID number, they can choose "I do not have login credentials to this site." This will take the participant to the next page where they can create an account.

- Create and complete the profile as a first-time user in Terra Dotta. Once the participant's profile is completed, they will be routed to their participant home page.
 - Passport: The system requires the participant to upload a copy of their passport (the passport page with their picture and information). **If the participant currently does not have a valid passport**, they can upload a document in place of the copy of passport in order to move on to the next section of the profile. When they have a valid passport, they will need to log back into their profile and upload the copy of their passport.
 - Click on the FLP program link under the Applications box. This will take the participant to the Program Application Page that will contain application instructions and documents they need to complete and submit.
 - **Applicants need to read the instructions carefully.**
 - Click on the questionnaire link under the Application Questionnaires (for a list of questions, [see Appendix Z.5](#)) box. Complete the questionnaire. Take time to compose thoughtful and complete answers to the short-answer questions. Applicants can save their responses and come back to them later, by clicking on the "Save" button. Once they hit the "Submit" button, their responses for the questionnaire will be submitted, and they will no longer be able to change their responses. The participant's responses to the questions will be reviewed by the program leaders as part of the acceptance process. Applications will not be considered for review until the questionnaire is completed.
 - FLP participants are not required to attend a SAA General Information Session as part of their application.
 - Applicants should check their email and Terra Dotta account frequently for possible messages from SAA and the program leaders.
3. **Faculty can conduct interviews with applicants while the application window is open. If you plan to interview the students, please share your interview questions with the SAA in advance to ensure that the questions cannot be perceived as discriminatory in nature.**
 4. The application system will be closed on a specific date (deadline for participants to submit their application will be posted on the SAA website).
 5. It is very important that faculty **do not notify participants of their decisions early**. By informing participants that they are "accepted", "waitlisted", or "denied" before the set notification date can cause a series of problems for the faculty leader, the SAA staff, and cause undue panic for the students. Additionally, program leaders should not accept participants or tell students that they will be accepted on a "first come first served basis".

NOTE: Currently, participants may not have more than one FLP application active at one time.

POST-DECISION PHASE

Faculty must not notify applicants of their application decisions prior to the close of application, before the application review period has concluded, or in advance of the SAA team notifying the participants of the program leader's decisions.

1. If accepted into the program, participants will receive a [Letter of Acceptance \(Appendix G\)](#) via their email address. They should retain this email for reference, as it will provide valuable information and links to additional forms that will need to be completed. **Do not notify participants of your decisions early. By informing participants that they are “accepted”, “waitlisted”, or “denied” before the set notification date can cause a series of problems for the program leader, other FLP programs and the SAA staff.**
 - Participants will log into their Terra Dotta account. On their application page they will see a panel called “Commitment to Participate” with two buttons. At this time, participants can commit to the program by clicking the Commit button or they can decline admission by clicking the Decline button.
 - Upon acceptance, participants will need to complete their [Commitment to Participate Form \(Appendix E\)](#) online. It is important they read the Commitment to Participate Form and to share this with their parents/guardians/partners before signing the document.
 - After a participant has confirmed their commitment to the program, they will be required to pay a \$500 nonrefundable deposit that will be applied toward their total program cost. Deposit instructions are available under participant Application Process on the SAA website.
 - It is a good idea to send your own email to follow up with the participants accepted into the program to encourage them to check their to-do list (i.e. completing the Commitment to Participate Form, paying their deposit, registering for their course(s), preparing to make their final payments, completing their participant Health Form, uploading a copy of their passport, and completing SAA's required FLP Pre-Departure Orientation). By communicating with participants about deadlines and expectations (financial or otherwise), we can potentially help offset attrition later in the cycle.
2. Once the participant has paid their deposit, they will receive an enrollment appointment to register for the FLP course through MyJSU. SAA will provide course registration instructions and enrollment timeline to participants via email. The information will also be available under participant Application Process on the SAA website. Applicants must register for the SJSU course by the deadline.
3. After the participant has registered for the course(s), they will see the outstanding balance for the remaining total program cost. Payment information will be provided in their course registration instruction, and will also be available under participant Application Process on the SAA website.

4. Applicants will complete the [Applicant Health Form \(Appendix M\)](#) online and upload a scanned copy of their passport (replacing the placeholder document if they have not uploaded their passport with their initial application).
5. Once all of the deliverables are uploaded into the application system and paid for the program in full, participants will have secured their placement in the program.

Reviewing applications and accepting participants into your program

SAA will review accepted participant applications for basic requirements that the program may have, such as GPA, completion of WST, upper division standing, etc. Please reference the SAA PowerPoint presentation for a step-by-step guide on how to access and review FLP applications ([Appendix Z.6](#)).

Faculty must not notify applicants of their application decisions prior to the close of application, before the application review period has concluded, or in advance of the SAA team notifying the participants of the program leader's decisions.

Refrain from messaging to participants that applications will be accepted on a “first come, first served basis”. This can cause unnecessary panic and anxiety for the participants. Participants should be accepted into the program based on the merits of their application, not the timestamp of when they applied.

- An email with a temporary login and password will be emailed to each Program Leader. The login and password are time sensitive, therefore Program Leaders need to sign in within 24 hours of receiving the email with this information.
- Program Leaders log into TERRA DOTTA.
 - *To log in the first time:* Go to <https://goabroad.sjsu.edu>. Click on “Non-SJSU Login/Register” to log in. All program leaders were added into the system by their email address, not by their SJSU ID. If you log in using your SJSU ID and password, you will not be able to view the applications you received for the program. **Enter the username and password that were sent to you via email.** Once you are logged in, you will be prompted to change your login ID and password.
 - After you log in, you will see your home page with a list of applications submitted to your program. If you are leading more than one program, you can click on “Filter Options” and choose the program for which you would like to see the applications.
- Next to each participant, you will see “Ready for Review” under “Status” when the application is complete and ready for your review.
- Click on the participant’s name to review the application.
- Once you reach the end of the application, you can provide feedback in the Comments section.
- Click “accept, waitlist, or reject” for each participant. Next, click “Mark as completed”, then click SUBMIT.
 - For any participants who receive “reject” status for their application, Program Leaders will need to provide a brief reason in the Comments section.

Incomplete Applications During Application Cycle: SAA will contact students with incomplete application and encourage them to complete their application by the application deadline. The system will also send out automatic reminders a few weeks prior to the end of the application cycle to remind the applicants. Faculty

should also to reach out to applicants who have not completed their application to encourage them to finish their applications.

Shared Google Drive Applicant List: SAA will share with program leaders a spreadsheet (via Google Drive) of applications received for their program. The spreadsheet is intended to help program leaders see when a student has submitted prepayment and required documents, and attended the required general pre-departure orientation. The spreadsheet will be updated at the end of each application cycle when the program leader has submitted the application decisions to SAA.

TERMINOLOGY:

- **Accept** – Applicants who are qualified to participate on your program and for whom you have space available (see your capacity for total number you may accept).
- **Waitlist** – Applicants who meet the majority of the qualifications that you would like to consider if a more qualified participant were to withdraw from the program or if you need additional participants to reach enrollment goals. Waitlisted students will have the opportunity to apply to another program, if there are no spots available for them on their first-choice FLP.
- **Reject** – Applicants who explicitly do not meet the qualifications established by your application questions or if you have more participants than spaces available. *Keep in mind that a qualified participant may withdraw from the program later in the process so if the participant meets most of the qualifications established in your application question, you may want to consider waitlisting them instead of rejecting them.*

You cannot decline a participant due to a physical, mental, or learning disability. You cannot decline a participant due to eating or dietary restrictions. If you are concerned about the on-site accommodations that can be provided to a participant with additional needs (physical, mental, learning or food related), please address those concerns with SAA. If you plan on conducting interviews with your participants, please share your interview questions with SAA in advance.

Increasing the number of participants on your program

If Program Leaders find themselves with more interested participants than they have space for and they would like to expand the number of participants, they must first discuss this with SAA. Together, we will evaluate whether or not it makes sense to expand the trip (taking into consideration logistics, cost, group dynamics, safety and security, etc.). This may include investigating added staffing to assist the Program Leader in running the program (although this cannot change the price of the program established in the budget).

Fewer participants than spaces

If there are not enough participants to fill the program, SAA will work with you to determine whether or not it still makes sense to run the trip. This will depend upon whether or not we can still recruit participants for the program, as well as the impact of the under enrollment on the budget. Just as with any SJSU course, under enrolled programs may have to be cancelled.

Waitlisted and Displaced Participants

If a program must be cancelled for any reason, SAA will work with the participants signed up for the

program to move them to a program that has not been cancelled, if they are still interested in participating in an FLP. SAA will reach out to any participants that are displaced or have been waitlisted at the end of the second application cycle to find alternative FLP options for them so they will be able to participate in an FLP if they choose. SAA will direct waitlisted and displaced students towards programs that are under-enrolled to increase the enrollment of those programs.

Deadlines for any and all aspects of an FLP are firm. If the program is under-enrolled, extensions to continue marketing and recruiting participants will not be possible outside of the pre-determined timeframes. This is due to the nature of processing FLPs, the campus offices involved, and the volume of FLPs that run each year. We **do not** allow individual FLPs to operate under different timelines.

Accepted Participants Meeting

Soon after accepting participants into their program, it is a good idea for Program Leaders to hold a brief meeting to explain the [Commitment to Participate Form \(Appendix E\)](#) to their accepted participants and to answer any questions about the program that will help them decide to commit.

As soon as participants decide to secure their spot on the trip, they must sign the [Commitment to Participate Form \(Appendix E\)](#). Program Leaders should be sure participants understand that once they sign and turn in the Commitment to Participate Form, they will need to pay the nonrefundable \$500 deposit, register for the course, and pay the program cost. Applicants must pay the remaining balance by the deadline. If a participant fails to pay off the balance by the deadline, the participant will not be able to participate in the program and will be liable for any payments made on their behalf prior to trip departure (plane tickets, other deposits) and for any amounts owed according to the refund policy and schedule.

Applicants, who are planning to apply their SJSU Financial Aid award or funding from a third-party should contact the Financial Aid Office directly to make sure the appropriate indicator is placed on their account so they would not be dropped from the course and the program.

In addition, at this meeting you can encourage SJSU participants to begin their financial planning right away. If the program has a final price, please direct SJSU participants to Financial Aid to determine how aid may apply to their particular situation. Additional suggestions to help participants plan for their funding: setting aside a portion of work study or other job pay, looking for scholarships, investigating loan options, asking family/friends for support, etc.

How participants commit to a program

1. Applicants must complete the [Commitment to Participate Form \(Appendix E\)](#). Applicants have until the deadline (posted on the SAA website) to complete their Commitment to Participate Form online. Failure to complete the Commitment to Participate Form by the deadline will result in losing one's placement in the program.
2. Upon submitting the signed [Commitment to Participate Form \(Appendix E\)](#), participants are financially committed to the program. Applicants can begin putting down their deposit as soon as

they receive their acceptance letter. Instructions for putting down the deposit will be provided via email and will also be available under participant Application Process on the SAA website.

FLP Course

COURSE SET-UP

Even though FLP courses are categorized as Special Session courses, they have different timelines from Summer Special Session courses. The FLP participant application timeline can be found under participant's Application Process on the SAA website. Please do not refer participants to the Summer Special Session timeline as that can be confusing to participants.

Program Leaders will need to complete the [Class Section Add Form \(Appendix Z.4\)](#) for each FLP course offered, which will be routed to the Program Leader by SAA. See [Appendix Z.4](#) for the form and for instructions on how to complete the form. SAA will schedule the course in PeopleSoft so participants can register for the course via MySJSU.

Each FLP course is typically scheduled as one section in the PeopleSoft system. Only in the instance where the program is offering two different courses and students are given the option to take one or both courses, program leaders may see one of the two courses scheduled with two sections. This is due to how the program fees and tuition are attached to the course in the PeopleSoft system. Compensation is determined based on the number of participants enrolled in the specific course and by the faculty member's rank on the salary schedule.

Courses offered on FLPs cannot offer a range of course credit. If a program leader is offering a course that has a range of units that may be offered, the program leader must decide how many units their course will offer, e.g. if faculty are offering a Special Topics course that can be 1-6 units, they must decide in their proposal the exact number of units the course will offer.

Study abroad service provider: For FLPs using a study abroad service provider or partnering with another institution, a course cannot be set up for participants to register in MySJSU until the contract has been approved at all levels.

APPLICANT REGISTRATION

SAA will send the final list of accepted participants to the Registrar's Office. The Registrar's Office will assign an enrollment appointment in MySJSU to each accepted participant. Once the Registrar's Office informs SAA that the enrollment appointments have been assigned, SAA will send an email to participants, providing the following details:

- Instructions on how to register
- Class number and section number (if there is more than one section of this course scheduled, participants will be provided the section number for the section they should be enrolled in) - FLP courses are scheduled to be searchable by using the class number and the summer term. Applicants must use the class number to search for the class they need to be enrolled in.

- Important registration deadlines

CANVAS FOR FLP PARTICIPANTS

Applicants will have access to Canvas on the first day of your class. If you need your participants to have access to Canvas prior to the first day of class, you can adjust your course start/end dates on Canvas. The following guide describes how to adjust the start/end date in Canvas.

<https://guides.instructure.com/m/4152/l/57088-how-do-i-change-the-start-and-end-dates-for-my-course>

GRADING

Program Leaders will complete grade reports and submit budget expense reconciliation to CPGE Finance within thirty (30) days upon completion of the program. Grade rosters are accessible through MySJSU. FLP grade rosters are typically opened at the end of each month (June and July) since classes end at different times.

In the case you see a discrepancy on the roster (e.g. a withdrawn participant appearing on your roster), please contact SAA immediately at facultyedprograms@sjsu.edu before inputting your grades. Due to the short nature of the Winter Special Session, the grades for the winter FLPs must be submitted by no later than the first Tuesday of the beginning of the spring semester.

Pre-Departure Orientation

FLP participants must complete a required general pre-departure orientation provided by SAA in accordance with [CSU Executive Order No. 1081 \(Appendix A\)](#). FLP Program Leaders will need to hold additional pre-departure classes/meetings to discuss site-specific issues. Most seasoned Program Leaders have determined that holding three or more meetings before traveling can be beneficial to the program outcomes while traveling. These meetings could include readings or other assignments to help participants prepare to maximize their cross-cultural experiences on site and to learn the key program-specific details your participants need to know. Basic ‘survival language’ skills should also be a part of any program going to a non-English speaking country. Program Leaders must provide site-specific pre-departure orientation and key safety information to participants before heading abroad. Additional topics to be discussed may include: packing, money matters, the [SJSU Student Code of Conduct](#), alcohol misuse and abuse, etc.

Distribute the syllabus for the course and the program itinerary at this time. Information about graded work impacting the final course grade should be included. Send a copy of the syllabus and Final Itinerary to SAA at spartansabroad@sjsu.edu, with your program’s “Destination” and “Syllabus/Itinerary” in the Subject line.

These meetings are also an excellent time to begin working on group dynamics and team building. It is essential that program participants understand how to work together as a group, as they will be spending a great deal of time together once on the program. Addressing this prior to departure can help the program start off much more smoothly once abroad.

Refrain from providing specific medical advice about medications, vaccines, or over-the-counter medications. Such advice is certainly well-intentioned and given out of concern for participants; however, travel recommendations change frequently. Best recommendations are connected to a participant's own personal health history and it is important that all program leaders avoid giving medical advice to their participants. Rather, this advice needs to be given by qualified health personnel, or from national or international reputable health agencies such as the CDC, WHO, etc. In addition to the frequent changes and need for the tailoring of personal medical advice, liability both to the program leader and to the University can result from giving incorrect medical advice. There are links on the SAA website to reliable sources for travel health recommendations such as the CDC, or you may refer participants to the SJSU participant Health Center (or any travel clinic) for advice. The SJSU participant Health Center can be an excellent resource and can provide travel health services to SJSU participants.

Make every attempt to communicate all necessary information to participants prior to the completion of the previous semester. If you plan to email participants between or after semesters, you may wish to ask participants if they can access email and what address they commonly use.

Please note that expenses associated with pre-departure activities need to be included in the budget. When developing your budget, it is very important to consider costs you may incur during the pre-departure portion of the FLP; this could include, but may not be exclusive to, texts used in class, language phrasebooks, guide books, FLP-themed t-shirts for the group, printed/bound journals, phone calls overseas to providers, program related excursions, etc.

TUITION AND REFUND

Participant Tuition and Fees

The FLP website lists the cost for all FLPs. For each program, there is a \$200 administrative fee and the tuition fee (\$250 per unit). Program fees vary depending on the destination and what is included (for example: airfare/meals/lodging, etc.). Some programs will have airfare (either local flights or the flight to the destination) included in the program's total cost, which may make the programs seem more expensive than others.

Participant Withdrawal from a Program

Participants requesting refunds should be directed to SAA, where they will be routed to the Bursar's Office for further processing.

Refunds for the travel portion of FLP Programs are explained in detail in the [*Commitment to Participate Form \(Appendix E\)*](#), signed by all program participants. The relevant section is copied here:

9. Withdrawal. If I withdraw from the program after accepting admission I immediately forfeit my \$500.00 non-refundable deposit and will be financially responsible for any payments made or any non-recoverable costs incurred or committed by SJSU and its affiliates on my behalf at the time of my withdrawal, whichever is greater. This may in fact equal the entire cost of the program. I

acknowledge that if I withdraw from this program, my non-refundable deposit will not be transferable to a different program.

If I withdraw, I will notify the Department of Study Abroad and Away and my program leader(s) in writing. The date the written notification is received is the date by which the financial calculation will be determined. If a balance is due at the time of withdrawal, I will pay SJSU to cover expenses incurred to that point. If I should decide to withdraw and fail to submit any written notification of my withdrawal and/or fail to show up at the program site, I understand I will be financially responsible for the entire program fee.

If I have received Financial Aid or grant or scholarship funding provided by San José State University for a program from which I withdraw, upon my withdrawal that aid will be reversed and I will be responsible for the entire balance of the program.

If I withdraw from the program prior to the program's first day, I will be required to withdraw from my course(s) and will receive a refund of any tuition and fees (note: this does NOT include non-recoverable costs described above). If I withdraw after the program's first day, refunds for any recoverable tuition and fees will be according to standard university policy, as stated in the Catalog. If I am put on probation or removed from the University after acceptance, it is my responsibility to withdraw from my program.

WITHDRAWALS PRIOR TO COURSE REGISTRATION

Participants withdrawing from an FLP after submitting the [Commitment to Participate Form \(Appendix E\)](#) will immediately forfeit the \$500 non-refundable deposit and may also be responsible for additional charges.

To officially withdraw from a program, a participant must:

- Send an email to spartansabroad@sjsu.edu to inform SAA and the Program Leaders of the decision to withdraw so that all costs incurred to that point can be calculated. The timestamp in which this email is received will be used as the official date that the participant submits the withdrawal request. The official withdrawal date will hold the participant accountable for any charges incurred up to that point as well as based on the refund schedule.
- Complete the [FLP Withdrawal Form](#)

SAA will send the participant a follow-up email with information about the next step of the process after the request has been reviewed.

Please do not tell a participant that no costs have been incurred or that they may be able to have their deposit refunded. Even if the Program Leader has not committed to specific expenses on behalf of the participant, a spot has been reserved for the participant on the program which has budget implications and impacts associated fixed program costs. Please allow SAA to communicate all costs that will be the responsibility of a participant upon withdrawal.

WITHDRAWALS AFTER COURSE REGISTRATION

Participants who withdraw from an FLP after submitting the [Commitment to Participate For \(Appendix E\)](#) and registering for the course will immediately forfeit their \$500 non-refundable deposit. They may also be responsible for additional charges.

To officially withdraw from a program, a participant must:

- Send an email to spartansabroad@sjsu.edu to inform SAA and the Program Leaders of the decision to withdraw so that all costs incurred to that point can be calculated. The timestamp in which this email is received will be used as the official date that the participant submits the withdrawal request. The official withdrawal date will hold the participant accountable for any charges incurred up to that point as well as based on the refund schedule.
- Complete the [FLP Withdrawal Form](#)
- Complete [Drop Petition Form](#) (the form will require the faculty's signature)
- Complete [Financial Petition Form](#) (to request a refund or reversal of outstanding charges)

FLP REFUND SCHEDULE

Refund Time Frame	Refund Amount
60+ days prior to program class start date	Refund 100% of Tuition Fee Minus \$300 Program Fee Minus \$200 Administration Fee
60 to 31 days prior to program class start date	Refund 100% of Tuition Fee Minus 50% Program Fee Minus \$200 Administration Fee
30 days prior to program class start date	Refund 100% of Tuition Fee Refund 0% Program Fee Minus \$200 Administration Fee
After program class start date	No Refund

SAA will provide instruction and information for the withdrawal process to the participants upon receiving their withdrawal request. Information about the withdrawal process can be found under [Program Withdrawal](#) webpage of the SAA website.

Registrar's and Bursar's Offices: SAA will inform the Registrar's and the Bursar's Offices of any participant withdrawals. Participants who withdraw from an FLP course prior to the start date of the class are removed from the roster without a W on the participant transcript.

Withdrawal from a Program - On Site

VOLUNTARY

If a participant has arrived at the program site and decides to withdraw, he or she must begin by discussing the situation with the SJSU personnel (program leader, etc.) on site. The SJSU personnel should consult with SAA to determine whether a solution exists for the situation. If, after consultation, the participant still plans to withdraw from the program, he or she must submit a signed and dated statement of explanation to the on-site personnel. This statement must indicate the participant understands that effective the date indicated, he or she will no longer be considered a participant in the program, and is therefore responsible and liable for his or her own actions, schedule, transportation home, insurance, etc. Email this signed and dated statement to SAA immediately at spartansabroad@sjsu.edu.

Consideration will be given to the participant who leaves a study abroad program because of an emergency situation or illness (either personal or of a family member). In addition to the statement of explanation, the participant must:

- Send an email to spartansabroad@sjsu.edu to inform SAA and the Program Leaders of the decision to withdraw so that all costs incurred to that point can be calculated. The timestamp in which this email is received will be used as the official date that the participant submits the withdrawal request. The official withdrawal date will hold the participant accountable for any charges incurred up to that point as well as based on the refund schedule.
- Complete the [FLP Withdrawal Form](#)
- Complete [Drop Petition Form](#) (the form will require the faculty leader's signature)
- Complete [Financial Petition Form](#) (to request a refund or reversal of outstanding charges)

INFORMAL WITHDRAWAL ON-SITE

A participant who, through his or her absence, demonstrates that he or she has withdrawn from the program during the Faculty-Led Program without obtaining an official withdrawal, will be reported as having failed the course(s).

A participant who leaves the University without formally withdrawing forfeits any fees or deposits paid to the University. The participant will continue to be responsible for payment of tuition and course fees and FLP program fees.

Financial Matters

Final budget

Once Program Leaders have a final roster of participants, they will receive a final program budget (the price will not have changed, however there may be additional program funds available for program expenses) and an expense reporting document from SAA. Program Leaders are expected to keep within their budgets and to keep up with proper expense reporting as they spend money.

Please review San José State University policies regarding appropriate travel and related expenses prior to departing. See [SJSU Travel Guide](#) for reference.

Contracts for program development, program providers, vendors, etc.

Program leaders working with an approved study abroad program provider, a foreign institutional partner, or an outside vendor will likely need to complete a contract or update an exhibit for an existing contract. Please identify that you are working with a vendor or partner during your Budget Meeting. Program Leaders will work with SAA in processing any new contracts or updating an exhibit for an existing contract shortly after the budget meeting takes place.

Contracts for FLPs can take a very long time to process and are required anytime a study abroad program provider, a foreign institutional partner, or an outside vendor provides more than a single service for a program (this can include bundling lodging and transportation services, tour guides and entry fees, etc.). New contracts can take anywhere from 9 - 16 months to process, therefore Program Leaders are encouraged to discuss any new partnerships with SAA 1-1.5 years in advance of the FLP running.

Program Leaders are not allowed to sign contracts or any documents with program providers, consultants, or vendors hired to assist in program development or supplying any service to the program.

Wire transfers to Vendors

For many payments to organizations both overseas and in the US, wiring money is an efficient way to pay program expenses in advance.

In order to set up the payment to the vendor in the SJSU Accounts Payable (AP) system, the vendor will need to complete the [Vendor Data Record Form 204 \(Appendix Z.12\)](#). They will also need to submit the [W-8BEN - for individuals \(Appendix P\)](#) or the [W-8BEN-E - for a business or organization \(Appendix Q\)](#) and provide an invoice of the total amount due. If the vendor is a foreign vendor that performs services entirely outside of the U.S., and the payments to them are treated as foreign sourced income and not subject to U.S. tax withholding and reporting, then they may submit the [Foreign Sources Statement \(Appendix Z.13\)](#) in lieu of the W-8 forms. Processing time for vendor set-up in the AP system and payment can take up to 5 weeks. The time frame may be longer due to unforeseen circumstances so SAA will work with program leaders to ensure this step is initiated as soon as possible.

The vendor should address the invoice to:

Study Abroad and Away
ATTN: Parinaz Zartoshty
College of Professional and Global Education

San Jose State University
One Washington Square
San Jose, CA 95192-0135

SAA will contact you several months before the program runs to obtain an invoice from your vendors. At that time, the Program Leaders will need to ask the vendor to complete the forms and return the completed forms with the invoice to SAA at spartansabroad@sjsu.edu.

Credit Card Payments to Vendors with CPGE Credit Card

Prepayments to vendors for lodging and transportation can also be made with the CPGE credit card, as long as the invoice is less than \$10,000. If you choose this option, vendors will not need to submit any paperwork other than an invoice. You will need to work with the CPGE Finance team to make any and all credit card purchases. Please notify SAA if you plan on using this option, as we may need to increase the credit limit on this card to accommodate the expenses of multiple programs. **Do not use your own credit card to make pre-payments before the contract has been fully processed, all participants have enrolled in the FLP course, and all participants have made full payment for the FLP.**

Deposits and Prepayments to Vendors

Program leaders cannot make advance payments to vendors or for program expenses (including but not limited to airline tickets, room reservations, program activities, etc.).

Payments can only be made once:

- the contract or contract exhibit has been fully processed (if applicable),
- all participants have enrolled in the FLP course,
- and participants have made full payment for the FLP.

If faculty chose to place deposits or make payments for program arrangements before all participants have confirmed their placement in the FLP by registering for their course and making full payment, they do so at their own risk. If the program is canceled before participants have registered and made full payment for their FLP, SAA will not reimburse faculty for any expenditures they incurred.

Faculty **cannot** encourage or require students to purchase airline tickets before the entire cohort has paid the full program payment.

Furthermore, participants should be informed that they should not make any flight arrangements or purchase airline tickets until the entire group has registered for the FLP course and has made full payment. If the program were to be canceled for any reason, SAA will not make any reimbursements.

Travel Authorization

Travel Authorizations are processed through and by CPGE. Travel Authorizations are not processed by the Program Leader's department or college. When filling out the Travel Authorization, make sure to use the Dept ID number provided by CPGE, and not the ID number of your department.

Program leaders will need to submit their Travel Authorization through the FTS system at least 45 days prior to departure. SAA will contact you to let you know when you should begin this process, as well as provide you with detailed instructions and pertinent information that you will need to enter into your Travel Authorization.

Please note that until the registration and payment cycles are completed, you cannot book or schedule any travel arrangements or accommodations. You are allowed to make reservations in advance, however you should not make any payments to hold your reservations, and if you do make a payment please make sure that the booking allows you flexibility to cancel without penalty and will provide a full refund. CPGE and SAA will not reimburse faculty for any expenditures incurred before all participants have registered and made full payment for the program.

Your Travel Authorization will require you to enter amounts for each expense you plan on incurring. You must follow the budgeted amounts in your final FLP program budget, as you will only be reimbursed for the amount listed on your budget. If you increase those amounts, your Travel Authorization will be denied and returned.

Before filling out your travel authorization...

Please review:

[The FTS guide for Travel Authorization](#)

[Travel Authorization Submission Guide \(Appendix O\)](#)

[The SJSU Travel Guide](#)

[The CSU Travel Procedure Guide](#)

Flight Cost

Although program leaders have airfare estimates included in their FLP budget, keep in mind reimbursement of transportation expenses will be based on the actual price of the purchased airline ticket. Airline tickets must follow the CSU and SJSU policies that all travel must be the most economical method of transportation and the most commonly traveled route consistent with the authorized purpose of the trip.

Specific information regarding air ticket purchases, per the CSU Travel Procedure Guide (NOTE: Airline Tickets must not exceed the budgeted amount in your FLP budget, any charges in excess of what was budgeted for will not be reimbursed):

B. AIR TRAVEL

1. Commercial Airlines

a) Coach or Economy Class

Coach or any other discounted economy-class fare shall be used whenever ticketing restrictions are reasonable. This applies to all travel (domestic or international, or any combination thereof) regardless of the purpose or fund source.

b) Business or First Class

When a traveler prefers to use a higher class than the one authorized for reimbursement, the traveler must pay the incremental cost of the airfare. A documented cost comparison must be attached to the Travel Expense Claim.

NOTE: Faculty must upload both the purchased upgraded seat receipt and a scan of the price for the Economy or Coach class airline ticket into FTS when reconciling the program expenses.

Use of business or first-class, pre-boarding or other higher-cost services may be authorized by the approving authority under the circumstances listed below. Documentation of such circumstances must be provided on the Travel Expense Claim.

- 1) Business or first-class is the only service offered between two points;
- 2) The use of coach class would be more expensive or time consuming, e.g., when, because of scheduling difficulties, traveling by air coach would require an unnecessary hotel expense, circuitous routing, or an unduly long layover when making connections;
- 3) An itinerary involves overnight travel without an opportunity for normal rest before the commencement of working hours; or
- 4) When necessary to reasonably accommodate a disability or medical need of a traveler.

Additionally, when purchasing airline tickets, please adhere to the SJSU Travel Guide policy on air ticket purchases:

Transportation by scheduled airlines shall be allowed at the lowest fare available at time of booking.

Purchasing Tickets

- Purchasing Airline Tickets through Official University Travel Agency: Making reservations through the official university travel agency, Fell Travel, is the preferred method of booking. Doing so alleviates the financial burden on the traveler and places it on the university.
- Purchasing Airline Tickets through an Internet Service: The use of the internet to secure cheap airline tickets has become more and more prevalent, but there are significant risk factors to consider before purchasing a ticket in this manner. If purchasing such tickets make certain that nothing will prevent you from taking the scheduled flight(s). When tickets are purchased in this manner, the traveler assumes all financial responsibility. Should the trip be cancelled, the university will not reimburse for tickets purchased.

Faculty are expected to purchase their airline tickets and receive reimbursement for the cost of the airline ticket. Per the CSU travel policy, "Travelers will not be reimbursed for non-cash certificates used for the purchase of transportation tickets, e.g., frequent flyer miles".

Selecting Seats on a Flight for an Additional Fee

When requesting reimbursement for expenses not normally reimbursed, in this case for a charge incurred in selecting seats in coach class on a flight, an explanation should be included with the travel reimbursement. Accounts Payable recognizes that sometimes the only way to get an assigned seat is to pay an additional fee, but without an explanation of the circumstances these charges will normally be deducted from your reimbursement. To ensure reimbursement, locate the airline's written policy on charges associated with seat selection (save as a PDF) and draft a short narrative as to why you paid the additional fees (as long as you are within your budget) and upload both documents into the FTS reimbursement system.

Using Fell Travel:

If you are planning to use Fell Travel to assist you in booking your flight, it is a good idea to contact Fell Travel first to get a quote of the flight before filling out your travel authorization. If needed, you can also let Fell Travel know the estimated airfare budget you have so they can search for flights within your range.

Filling out your travel authorization (TA)... Visit <http://my.sjsu.edu/> and click on the FTS link.

Enter the dates you will be traveling (including personal travel) in the "Departure Date" and "Return Date" fields. If you are traveling for personal reasons, please upload a word document with a paragraph outlining your FLP dates (please also note if you have been approved to arrive a day or two early to prepare and/or leave a day or two late to wrap up the program) and any additional personal/business travel dates. You upload additional documents by first clicking "save" so the information you have entered in the fields will be saved. Then scroll all the way to the bottom of the TA page where you will see a button that says, "upload attachments". Add the supporting document there.

Reflect expenses (included in program fee budget - not tuition or admin fee) which are going to be paid by the faculty leader; for example, meals for faculty and group meals that faculty will pay for, entry fees to activities, ground transportation costs, honoraria, gifts for partners, excursions (not paid in advance, but on site out of pocket), etc.

Estimated Expenses	
Transportation	<input type="text" value="0.00"/>
Registration/Tuition	<input type="text" value="0.00"/>
Lodging	<input type="text" value="0.00"/>
Meals	<input type="text" value="0.00"/>
Other	<input type="text" value="0.00"/>
Total	<input type="text" value="0.00"/>

**Do not include in this section the expense items for student & faculty insurance, invoices/credit card payments made by CPGE directly to a service provider/vendor/lodging, airfare (if purchased through University Travel Provider AKA Fell Travel or through a CPGE credit card), etc.). Enter this information in the "Additional Trip Details" Box (see below).

Trip Information

* Departure Date

* Return Date

* Destination
Country: Falkland Islands (Malvinas)
City:

* Purpose of Trip

* Travel Type
 Business Related
 Team Travel
 Field Supervision Travel
 Travel Paid By Non-University Funds

Additional Trip Details

Other expense items (which will be funded from the approved program fee) should be listed in the section on "additional trip details" on the TA.

In the box found above next to the giant red arrow, please list the following information:

- Amount budgeted for faculty and student insurance
- Any payments that will be paid in advance by CPGE via wire transfer, CPGE credit card, and/or bookings through Fell Travel, including but not limited to:

- Flights
- Lodging (for faculty, students, or both)
- Vendor
- Study abroad service provider
- Partner institution's registration fees
- Coach bus
- Etc.

*Any t-shirts, swag, gifts with SJSU logos must be purchased through a SJSU approved vendor. Please contact spartanabroad@sjsu.edu for assistance in procuring these items. You can also purchase items from the SJSU bookstore to make this easier (but only if you budgeted for these expenses).

For cash advances, please remember to enter that information into this section (please do not ask for the entire amount of money spent out of pocket to be provided as a cash advance - so if you enter that your estimated expenses will total to \$14,000, please do not request all \$14,000 to be given as a cash advance):

Advance Requested

Amount

Line #	* Account	* Fund	* DeptID	Program	Class	Project	* Amount	Percentage			
1	<input style="width: 60px;" type="text" value="107001"/>	<input style="width: 60px;" type="text"/>	<input style="width: 60px;" type="text"/>	<input style="width: 60px;" type="text"/>	<input style="width: 60px;" type="text"/>	<input style="width: 60px;" type="text"/>	0.00	<input style="width: 60px;" type="text"/>	<input type="button" value="▲"/>	<input type="button" value="⊕"/>	<input type="button" value="⊖"/>
	<input style="width: 60px;" type="text"/>	<input style="width: 60px;" type="text"/>	<input style="width: 60px;" type="text"/>	<input style="width: 60px;" type="text"/>	<input style="width: 60px;" type="text"/>	<input style="width: 60px;" type="text"/>					

In requesting this advance, I recognize it as a debt due to the State of California, and I acknowledge that the university can, under IRS regulations, report the advance as income if it is not properly claimed or refunded within 120 days after the end of a trip.

The estimated amounts of your expenses should not exceed the amount budgeted in your FLP budget. If the actual cost of a given expense line item exceeds the amount budgeted, you will need to reduce or cut your budget in a different line item to balance out the increased estimate.

Lastly, Attach your approved and final FLP budget (with the actual student numbers consistent with your enrollment) with your TA.

Estimated Expenses Section:

When entering your estimated expenses, please refer to your final FLP budget for the amount you would need to input into FTS.

Funding/Source/Chartfields Section:

SAA will provide an email with all the information you will need to input into the Funding/Source/Chartfields section of the Travel Authorization to ensure it gets routed to CPGE. The email will contain a chart similar to the one below.

Account Number	XXXXXXX
Fund Number	XXXXXX
Dept ID	XXXX
Class Code (each FLP has a specific Class Code)	XXXX

Tracking Expenses and Reconciliation

Program Leaders will need to document every expense so that the program’s accounts can be reconciled upon return. Using the FLP [Transaction Worksheet \(Appendix R\)](#) prepared for you by the SAA will help in tracking your expenses. Entering your expenses into the [Transaction Worksheet \(Appendix R\)](#) every day will keep you on track to complete the reimbursement process quickly. If you cannot log your expenses every day you can always create an expense journal. And remember... keep all receipts. IF you are not provided with a receipt of if you lose a receipt, you will need to complete a [Certification of Receipt of Goods Form \(Appendix Z.14\)](#) for each receipt.

Upon return, faculty will work directly with SAA and the CPGE Finance team to reconcile expenses in association with SJSU Procurement Services policies and guidelines. CPGE Finance may have follow up questions regarding your reconciliation process; please respond to any questions as soon as you are able to ensure the process stays on track. After CPGE Finance approves your submission, AP will begin their review of your reconciliation. AP may have additional questions regarding your submission. Please respond as soon as you are able. After AP approves your submission, your reimbursement will be processed.

Any expenses that have not been budgeted for, expenses surpassing the budgeted amount, and unallowable purchases (alcohol, paying for more than one hotel room at the same time, personal travel, etc.) will not be reimbursed. Reimbursements cannot exceed the total amount of fees collected for the program. CPGE is not responsible for program deficits arising from over-expenditures.

Cash/ATMs

It is always a good idea when traveling to carry \$200 in cash, ideally hidden in something you are carrying. This is emergency cash. Otherwise, it is generally best to not carry too much cash. In many countries, you can obtain cash through an ATM using your debit card and take out cash as you need it (to ensure you are not carrying large quantities of cash, thereby making yourself a target for thieves). If you are going to a location where using an ATM is not feasible, the best thing to do is to pay for as many things in advance (by wire or check) as possible. Obviously these guidelines may not work in every location. Please discuss with SAA your strategy for paying expenses associated with the program well in advance of your departure.

Cash Advances

Program Leaders can request a cash advance when submitting their travel authorization. Please reference the [Travel Authorization Guide](#) for instructions on requesting a cash advance. Please note the CSU rules for cash advances: "a traveler should have no more than one outstanding cash advance at a time, each cash advance should be accounted for before another cash advance is granted".

Cash advances are issued approximately one month before the departure month. Then they are sent to the Bursar's office, Window 1. Window 1 will call the employee and notify them that the check is available for pickup.

Expense reports

Each Program Leader (or individual when there is more than one program leader) will have a transaction worksheet that needs to be updated daily during the trip. Program Leaders are required to attend a training to learn how to utilize this spreadsheet and also to learn how to present receipts and requests for reimbursement. This process may differ from that of your expense reporting in other university departments. Any questions should be directed to SAA. The Program Leader(s) will submit their budget reconciliation into FTS within thirty (30) days upon completion of the program, this includes uploading the [Transaction Worksheet \(Appendix R\)](#) and all receipts.

Equipment

Phones: If budgeted for, Program Leaders may purchase an inexpensive local phone (one-time purchase) or a local sim card (to place in their own phone) for program business. Please note that this must be included in the program/site visit budget in advance. Calls relating to program management (making reservations, checking on logistics, etc.) must also be included in the program budget. The program budget will not include funds for phone calls home or other personal calls. You will need to provide receipts for any purchases and bills relating to phone use if you are seeking reimbursement for phone usage.

There are several free alternatives available to contact home while traveling in lieu of a phone; the app “What’s App” provides free texting capabilities worldwide and Skype can be downloaded onto a smart phone and used to make voice/video calls via a wireless internet connection.

Guidelines for accompanying family members

Guidelines related to family members accompanying a FLP Program Leader differ significantly between Traditional FLPs and Direct Enrollment FLPs.

Program Leaders serving as a chaperone and not teaching on a Direct Enrollment FLP are allowed to have family members accompany them during the program, although they should not interact or overlap with program participants. Direct Enrollment FLPs are typically static, allowing Program Leaders to set up household in a single location for the duration of the program. Please see the conditions for accompanying family members on a direct enrollment program regarding accompanying minors below. Notify the SAA regarding who will be accompanying your trip, so we can procure insurance for them.

On the other hand, family members are not allowed to accompany Program Leaders of Traditional FLPs. FLP programs are intensive; usually itinerate programs, which by their nature consume most of the attention of Program Leaders during the duration of the program. With the exception where the family member will be co-leading or volunteering for the program, the Program Leader must notify SAA in the program proposal and budget meeting as there will be required documentation to be completed.

It is important to note that faculty-led programs are for enrolled San José State University students only; Spouses/Partners, Children, Parents, Friends, Guardians, Community Members, etc. cannot participate on, overlap with, or plan personal/family travel experiences with participants/faculty during a Faculty- Led Program. Only the faculty of record and students listed on the official roster provided by the Department of Study Abroad and Away at SJSU are sanctioned to participate in the program. This policy applies to both faculty and students. If a person affiliated with the faculty member or participant engages with the program in any way, it will be grounds for removal (for participant) or termination of the FLP running in future cycles (faculty).

Conditions for exceptions to this norm are explained below.

Conditions for accompanying family members on a Direct Enrollment FLP

The following policies describe the limits or conditions that apply to the accompaniment of family member(s), friend(s), or any other non-FLP participant(s) that accompany or overlap with a Direct Enrollment FLP.

Notification: When an FLP Program Leader plans on having family member(s), partner(s), or any other non-FLP participant(s) accompany a Direct Enrollment FLP, they need to notify SAA. It is critical that the participation of a family member(s), friend(s), or any other non-FLP participant(s) does not distract in any way from the primary responsibility of the Program Leader to participants on the program.

Program Money: In no case is program money to be used to fund family member(s), partner(s), or any other non-FLP participant(s) participation. It should be made clear to participants that no program funds are used to support the activities of an accompanying family member(s), partner(s), or any other non-FLP participant(s).

Insurance: SAA will coordinate with the Program Leader to obtain insurance for their family member(s), partner(s), or any other non-FLP participant(s). The Program Leader will be responsible for paying for their family member(s), partner(s), or any other non-FLP participant(s) insurance coverage. The program leader can also obtain insurance for their family member(s), partner(s), or any other non-FLP participant(s) on their own. SAA recommends that all travelers obtain a policy that includes health, evacuation, and repatriation coverage.

Excursions/Travel: Accompanying family member(s), partner(s), or any other non-FLP participant(s) may not participate in program excursions and field trips. Program excursions are planned to accommodate participants and the program leader(s). Even if there are empty seats on the bus, boat, or other arranged travel, accompanying family member(s), partner(s), or any other non-FLP participant(s) may not travel with the group. If moving to a secondary or tertiary location during the FLP, family members, friends, or any other non-FLP participants must arrange their own independent travel between sites.

Group Meals: Program Leaders must not use program money for any meals (group or otherwise) for accompanying family member(s), partner(s), or any other non-FLP participant(s). A meal can be purchased for an institutional partner, tour guide, or other program related staff/collaborators using program money, as long as the expense is reasonable per the [SJSU Travel Guide](#). Program Leaders must write the name of the guest on the meal receipt when hosting an institutional partner, tour guide, or other program related staff/collaborators to a meal.

Accommodations: Accompanying family member(s), partner(s), or any other non-FLP participant(s) may share accommodations with the program leader(s), provided such sharing is allowed by the housing provider. The program budget will include housing expenses only for the Program Leader. If housing costs are based on a "per person" rate or if the Program Leader requires a larger unit (hotel or apartment) to accommodate their family member(s), partner(s), or any other non-FLP participant(s) the Program Leader must pay any costs above the amount budgeted for their individual accommodations. In no case should the

Program Leader or the Program Leader's family member(s), partner(s), or any other non-FLP participant(s) share rooms with participants, e.g. shared rooms in a hostel.

Minor Children: Minor children are generally not permitted to accompany FLP Program Leaders leading a Direct Enrollment FLP. There is simply too much risk for distraction away from student participants on a short, intensive, itinerate program. Minor children may only be permitted if they will be supervised by someone other than the Program Leader for the duration of the program at the expense of the Program Leader. The Program Leader must first discuss any minor children they would like to accompany the program, and if the SAA approves of the arrangement, they faculty leader must provide written notification to SAA that minor children are accompanying the Program Leader and describing how they will be cared for during program activities.

Pre-Departure Travel Information

U.S. Passports

The information outlined below is intended for domestic participants who currently do not hold a U.S. passport. If your participant is an SJSU international student, please refer the student to the International Student and Scholar Services Office for further advising in regards to their status when traveling outside the U.S.

If a participant does not have a U.S. passport, the information below outlines the process of applying for a U.S. passport for first-time passport holders.

1. Go to the [State Department website](#) and click on the 'APPLICATIONS & FORMS' button.
2. Complete the DS-11 Form: Application for a U.S. Passport. Follow the links to either print the document and complete it by hand, or in the online electronic form (you will print the completed form when finished).
3. Submit the DS-11 Form and all other required materials (see below) in person at an [Acceptance Facility](#) or at a [Passport Agency](#) (follow the links for search tools to find the most convenient facility).

More information can be located by clicking [here](#) or by visiting the following website: <https://travel.state.gov/content/passports/en/passports/applyinperson.html>

When submitting a passport application for the first time, ONE MUST BRING:

- A completed [DS-11 Form: Application for a U.S. Passport](#)
 - Do not sign the form until instructed by the Acceptance Agent
- One passport photo (Some Acceptance Facilities offer this service on-site)
 - To avoid processing delays, be sure your photo meets all the requirements and is properly submitted with your application.
 - The photo should not be attached to Form DS-11
- Evidence of US Citizenship (One of the following documents)

- o Previously issued, undamaged U.S. Passport
- o Certified birth certificate issued by the city, county or state
- o Consular Report of Birth Abroad or Certification of Birth
- o Naturalization Certificate
- o Certificate of Citizenship
- Current form of identification (Bring a photocopy of the front and back sides)
 - o Current, undamaged U.S. passport
 - o Recently issued Naturalization Certificate
 - o Valid Driver's License
 - o Current Government ID (city, state or federal)
 - o Current Military ID (military and dependents)
- Payment for passport fees:
 - o Application Fee and any Optional Services Fees may be paid via:
 - Personal checks, money orders and bank drafts at all locations, payable to "Department of State"
 - Exact cash at some locations (verify with the Acceptance Facility)
 - o \$25 Execution Fee Paid Separately:
 - Money orders and bank drafts at all locations, payable as instructed by the Acceptance Facility
 - Personal checks and exact cash at some locations (verify with the Acceptance Facility)
 - Credit cards at U.S. Postal Facilities and some other locations (verify with the Acceptance Facility)

More information can be located by clicking [here](#) or by visiting the following website:
<https://travel.state.gov/content/passports/en/passports/information/fees.html>

Passport Acceptance Facilities near San José State University

[Santa Clara County Clerk-Recorder](#)

70 WEST HEDDING STREET

SAN JOSE, CA 95110

408-299-5688

- o Open Monday-Friday
- o You must call to make an appointment to submit your application.
- o Photos can be taken on site.

[Eastridge Station](#)

2200 EASTRIDGE LOOP

SAN JOSE, CA 95112

- o Open Monday-Saturday (Closed for lunch 1:00 pm-2:00 pm)
- o Walk-in only.
- o Photos can be taken on site.

To locate additional Passport Acceptance Facilities click [here](#) or visit the following website:

<http://iafdb.travel.state.gov/>

Visas

Depending on the location where you will be traveling, you and your participants may need to procure visas. It is important to investigate visa requirements in the planning stages when developing your FLP. Each country has their own rules and steps to complete this process. You can generally find information about visa requirements by visiting the destination country's embassy or consulate website (for U.S. citizens), which will state whether you will need a visa to enter the country or not. If you do need to procure a visa, you can either work with a visa processing agency and pay a fee (which should be included in your program budget) to have the visas obtained on your and your group's behalf, or you can require each participant to obtain their own visa by visiting the consulate independently. Obtaining a visa may require that participant to visit the destination country's embassy or consulate in person. If you need assistance with this process, please contact SAA.

Traveling with international participants, DACA (DREAMers), and asylum seekers

International Participants/Citizens

Some countries that do not require U.S. citizens to have a visa for entry may require passport holders of other countries to have one, and the process of obtaining a visa can be different depending on their country of origin.

Either you or your participant will need to visit the destination country's embassy or consular website and look for the specific steps to be taken to obtain a visa based on the participant's citizenship. This may require that participant to visit the destination country's embassy or consulate in person to obtain a visa. International participants/citizens should also seek advising from the International Student and Scholar Services Office in regards to their status when traveling outside the U.S.

If your participant needs a letter explaining their participation in the program, please contact SAA so we can work with you to issue the letter to the participant.

If a student enrolled at SJSU as part of an exchange program would like to participate in an FLP, they should be referred to the Study Abroad Office to discuss their eligibility.

DACA (DREAMers) and Asylum Seekers

Some participants interested in FLPs may be DACA (DREAMers) students or asylum seekers and may hold a non-U.S. passport or may not have a passport due to their immigration status. Currently, due to possible changes in U.S. immigration policies, we believe that it would be prudent for DACA or Deferred Action for

Childhood Arrivals (DREAMers) students not to travel outside of the United States. We encourage those students to substitute international experiences with domestic immersion experiences within the United States rather than leaving the country. SAA staff will be working with the Colleges and Departments to identify these "study-abroad-at-home" experiences within the U.S. On campus, there are many opportunities to engage in international experiences including participation in the Global Student Network, living at the International House, pursuing recognition of your international involvement through the Global Leadership Advancement Center (GLAC), and volunteering in the community locally. If you have questions or concerns, please e-mail spartansabroad@sjsu.edu.

NOTE: \$500 nonrefundable FLP deposit may be refunded to international participants/citizens that are denied visas and are unable to participate in the FLP for which they were accepted. International students who wait too long to begin the visa process may not receive a refund. Decisions regarding refunds will be made on a case-by-case basis by SAA.

Participant Health

Program Leaders should refrain from providing specific medical advice about medications, vaccines, or over-the-counter medications. Such advice is certainly well-intentioned and given out of concern for participants; however, travel recommendations change frequently. Best recommendations are connected to a participant's own personal health history and it is important that all program leaders avoid giving medical advice to their participants. Rather, this advice needs to be given by qualified health personnel, or from national or international reputable health agencies such as the CDC, WHO, etc. In addition to the frequent changes and need for the tailoring of personal medical advice, liability both to the program leader and to the University can result from giving incorrect medical advice. There are links on the SAA website to reliable sources for travel health recommendations such as the CDC, or you may refer participants to the SJSU Student Health Center (or any travel clinic) for advice. The SJSU Student Health Center can be an excellent resource and also provides travel health services to SJSU participants.

Some countries have specific immunization requirements that need to be fulfilled before departure; others have recommendations for travelers. *It is the participant's responsibility to be aware of new health information regarding the locations to which they plan to travel.*

The U.S. Centers for Disease Control (CDC) and the World Health Organization (WHO) provide a wealth of information for the traveler. The SJSU Student Health Center can also provide travel health services to SJSU participants.

Please have participants review the pertinent travel health information on their websites prior to their departure.

- [U.S. Centers for Disease Control \(CDC\)](#)
- [World Health Organization \(WHO\)](#)
- [SJSU Student Health Center](#)

FLP Program—On Site

Safety and Security

Safety and Security document

Program Leaders are required to submit a completed [FLP Safety and Security document \(see Appendix C\)](#). A draft of this document is now part of any new site visit proposal (the document should be completed while on the site visit). Final Safety and Security documents must be submitted to SAA by April 1st for May/June departures and by October 1st for spring and winter break trips.

Register with the U.S. Embassy in every country you visit

The program leader(s) is responsible for registering their groups with the [Smart Traveler Enrollment Program \(STEP\) through the U.S. Department of State \(Appendix U\)](#). The STEP program will work in conjunction with the U.S. Embassies for each country the program will visit on the FLP so that the local embassy will be aware of your group travel. You can subscribe to STEP by creating a group submission; you do not need to create individual entries.

Registration at the U.S. Embassy or Consulate (in the country you are visiting) makes your presence and whereabouts known, in case it is necessary for a consular officer to contact you in an emergency. During a disaster overseas, American consular officers can assist in evacuation, were that to become necessary. But they cannot assist you if they do not know where you are (complete instructions on how to register your group with the U.S. Embassy in [Appendix U](#)).

NOTE: Participants who are not U.S. passport holders cannot be entered into the Dept. of State program. They should register with the country embassy based on the passport they will be traveling with.

Travel warnings

The State Department issues travel warnings for specific countries as needed. Detailed information can be found at www.travel.state.gov. If a travel warning has been issued for the countries to which you are planning to travel prior to the group departure, chancellor's office approval is required per [CSU Executive Order No. 1081 \(Appendix A\)](#). SAA will discuss the situation with Program Leaders to determine whether or not the trip can proceed as planned.

If a travel warning is issued after the group is already in the country for which the advisory is issued, SAA will work with the CPGE Dean and the chancellor's office to discuss the situation and make alternative plans as needed.

Faculty and staff who are conducting site visits should also monitor travel warnings for the countries they plan to visit. At any time, SAA reserves the right to deny proposals to conduct site visits or to cancel FLPs that are traveling to countries which have a State Department Travel Warning issued.

Loss or theft of passport

Lost or stolen passports must be replaced immediately, as travel may be delayed due to time needed to process a new passport. If a participant were to lose or have their passport stolen during the FLP, the program leader should work with the participant to develop a plan as to how the participant will obtain a replacement passport. You can find step-by-step instructions on how to replace a lost passport in [Appendix W](#).

To assist a participant in reporting a lost or stolen passport while abroad, follow the instructions provided by your local embassy or consulate (usually listed on their website under "American Citizen Services"). More information regarding reporting a lost or stolen passport can be found at the State Department's Lost or Stolen Passports Web page <https://travel.state.gov/content/passports/en/passports/lost-stolen.html>.

If you are unsure how to accommodate a participant in this situation, please contact SAA to discuss options.

Emergency cards

All participants and program leaders should carry an [emergency card \(Appendix V\)](#) with phone numbers for the host country's equivalent of 911, Program Leader(s) cell phones, SJSU University Police, and any other key contact information. On trips where you are staying in just a couple of lodging sites, it is a good idea to include the lodging name, address and phone number on the back side of the card. Faculty Leaders should make these cards at SJSU prior to trip departure and should issue them at the airport at the start of the trip.

Transportation/vehicle safety

During the planning stages, ground transportation should have been arranged for all travel whether public transportation, charter buses, or rental vehicles. If you arrive to find that the company has changed for the worse, use local contacts to find another reliable company. If you determine that a driver that has been hired to drive the group from place to place is intoxicated or otherwise incapacitated, you should contact the transportation company and request a different driver/alternate means of transportation. It is better to miss an activity or be late than to risk driving with a drunk driver. In addition, if a driver seems to be reckless, it is important to address the issue immediately (by either asking the driver to be more careful or by calling the company, reporting the situation and requesting another driver).

The program leader(s) is not allowed to consume any alcohol (zero alcohol use) when driving participants on an FLP. It may seem fairly innocuous to have a beer or cocktail with dinner, however a participant may see you consume an alcoholic beverage and perceive that you a) have had more than one drink or b) may be intoxicated. In situations where one is responsible for transporting participants, we need to be cognizant that perception is reality to those that are watching you closely. Therefore, it is essential to err on the side of caution and not consume any alcoholic beverages when you know you will be driving.

When traveling abroad and renting a vehicle to transport participants, faculty, or staff from destination to destination you will need to purchase rental vehicle insurance. Whenever a rental car is used for transportation on an FLP, the program leader **must** purchase the maximum level of insurance possible and available through the rental agency, including but not limited to Collision Damage Waiver and third-party liability. The cost of the insurance must be included in the program budget. The cost of insurance can make

renting a car for an FLP prohibitive. As such, SAA strongly encourages program leaders to hire a company to provide transportation in lieu of driving a rental car. Any program leader or volunteer driving during an FLP must submit:

1. *Application for University Vehicle Operation/Authorization Budget and Risk Management* ([Appendix Z.10](#))
2. Copy of a valid driver's license
3. Proof of completion of SJSU's online "Defensive Driving Fundamentals Training Course"

On site safety

When developing the FLP, all program leaders should have evaluated the safety and security of lodgings and areas where the group will be traveling. Situations can change and if a program leader determines that a lodging site or other plan is no longer a safe one, an alternate plan should be created and executed on the spot. Please be sure to email spartansabroad@sjsu.edu if any change to lodging site or itinerary is made so the Safety and Security document can be appropriately updated.

Be sure to warn participants about any potential dangers in the areas you are visiting. If you are aware of a danger and fail to warn your participants about it, this could be considered negligence from a legal standpoint. Again, please be sure to warn participants about any potential dangers in the areas you are visiting. Familiarize yourself and your participants with relevant local laws (alcohol and drug laws, etc.)

It is a good idea to remind participants to carry duplicate copies of their important documents while traveling, in case they misplace the originals, or if they are robbed. These documents should be placed in different locations, so if someone's suitcase or purse is stolen they would have copies in a second and possibly third location. Some documents that should be duplicated would be credit cards/ATM cards (front and back), Passports (photo and signature pages), immunization cards, prescription bottle labels, health insurance cards, visas, etc.

Many trips include at least some free time for participants. We recommend that participants use the buddy system and spend their free time at least in pairs, preferably in small groups of 3 or 4, for safety reasons. We also ask program leaders to tell participants to notify them what they think they're likely to do/where they are likely to be during free time. This will be invaluable in case an emergency were to arise and you need to bring the group together quickly. The independent travel policy is as follows:

*For programs that include free-time, participants must provide all travel plans to the Program Leader in advance. Additionally, participants who choose to travel independently during their scheduled FLP cannot travel further than 3-5 hours' distance from the program site **within** the host country.*

Basic travel smarts

Please be sure that you and your participants remember and practice basic travel smarts:

- Use the buddy system—it’s always better to be in at least pairs (or small groups).
- If you carry cash, carry it in a money belt or neck pouch. Carrying large sums of cash should be avoided.
- Always be aware of who is around you and have a plan should someone approach you in an unwanted way (e.g. run to a store, police, etc.).
- If you are mugged, give the mugger everything they are asking for (better to lose phone, camera, money than risk safety).
- Carry your SJSU ID, emergency and insurance cards at all times; if local law requires, carry a copy of or your actual passport (in a money belt, or neck pouch).

Health and insurance information

Self-disclosed health forms

All participants complete [a medical form \(see Appendix M\)](#). This information is self-disclosed and includes information on allergies and medical conditions. Program leaders should read all health forms prior to departure and should note any participant that might need special attention (bee sting allergies, peanut allergies, etc.). There is a self-disclosed health form for program leaders ([see Appendix N](#)) in which they can describe any health issues/conditions that someone would need to know in an emergency. Faculty Health Forms are only used for emergency situations. They are deleted at the end of every program cycle.

FLP Insurance Policies

Faculty Insurance

All program leaders traveling on FLP overseas programs must carry the [CSU Foreign Travel Insurance Policy \(FTIP\)](#), a policy through Alliant Insurance, per the California State University Risk Management Authority. Faculty FTIP will be arranged and procured by CPGE. Faculty insurance is procured once the faculty leader has submitted and has received approval of their [Travel Authorization \(Appendix O\)](#) submitted into the FTS system. The price of FTIP is contingent upon the number of countries visited and the duration in country(ies). Additionally, the price of the policy can increase if the country(ies) visited are on the [CSU High Hazardous Country List](#) or has a travel warning/alert issued by the [U.S. State Department](#). SAA will not pay for insurance to cover a faculty leader’s personal travel beyond the program dates. When entering the program dates into your Travel Authorization in the FTS system, faculty need to list all travel dates (professional and personal) and upload a narrative to their TA noting the program dates so that the SAA Finance team can differentiate personal travel either before or beyond the program dates. The FTIP insurance costs are factored into the FLP budget.

Participant Insurance (As of 6/1/22, subject to change in future)

All FLP participants will be provided with insurance coverage for the FLP program dates. Currently, the participant insurance plan is issued through OnCall International. Each participant will have their own

insurance card issued via email. Please remind your participants to look for their insurance card and information in their email accounts. Participants should print all the forms and the insurance card prior to travel, and should carry this information throughout the FLP. Forms and policy information can be found in [Appendix Z.7](#). Participants will need to process any insurance claims independently upon their return to the U.S.

OnCall International can be contacted through the following phone numbers:

- 1-833-425-5103 (Toll Free within USA/Canada)
- +1-603-952-2688 (Collect outside the USA/Canada)

Domestic travel is not covered through OnCall International. It is important to collect copies of participants' domestic health insurance cards prior to departing on a domestic program.

Liability/Evacuation/Crisis Response Insurance

Both the faculty and student insurance plans have accidental health, evacuation and repatriation coverages.

High risk recreation

Our insurance policies cover limited high risk recreation activities for participants and do not cover any high risk recreation activities for program leaders. These activities include: skydiving, parachuting, hang gliding, mountain climbing, bungee jumping, spelunking, zip-lining, rafting on white capped water, horseback riding (more than a walk), ATV/motorcycle riding, etc. Program Leaders should inform participants that they **are not permitted** to engage in these activities.

Accessing emergency information while traveling

We strongly encourage Program Leaders to carry a hard copy of their completed Safety and Security document and hard copies of the [Preliminary Incident Information Sheet \(embedded in Appendix X\)](#) with them while traveling. The SAA will also retain a copy in case a replacement is needed.

Program Leaders can access student passport scans and health forms in Terra Dotta.

Preliminary Incident Information Report (PIIR)

Please be sure to carry several hard copies of this report with you while you are traveling. In addition this can be found in the appendix of the Program Leader Handbook [\(embedded in Appendix X\)](#).

In any incident, it is a good idea to complete one of these reports. Any time medical personnel or law enforcement are engaged, this report MUST be completed. This report will help you organize information and your plans. It also is a simple fact sheet that you can then read to UPD when reporting the emergency or in an email to SAA. This provides people at SJSU with the information they need to start to assist you in any kind of emergency. This report is part of your ongoing log of any incident.

Reporting incidents to SJSU:

For emergencies, the first call you make should be to UPD: 001-408-924-2222. You can call collect if needed.

For non-emergencies and questions about issues or concerns that arise:

- Complete the [FLP Non-Emergency FYI Reporting Form](#) if there is no response needed and the program leader is simply notifying the SAA office for their information only
- Email spartansabroad@sjsu.edu with “Needs Response” in the subject line of the email if you require assistance with a situation or need a response for non-emergency situations

FLP Risk Management Emergency Action Protocol ([Appendix X](#))

The FLP Risk Management Emergency Action Protocol has step-by-step *guides* for responding to various kinds of emergencies. Every situation will be unique and you as Program Leader will have to adapt to manage a particular situation. The important things to remember in every single case:

- Ensure the safety of the group
- Utilize the support available to you (local support and support from SJSU—you do not have to have all the answers yourself)
- Document every situation thoroughly, including noting the time each time you add to your log
- The first call you make to SJSU to report an incident is to UPD at 001-408-924-2222.

As needed, an Incident Manager will be designated at SJSU. This person will become your primary contact throughout the management of the incident. Please read these Action Plans many times so that should an emergency occur, you are already familiar with the steps to follow. It is also a good idea to carry hard copies of these with you.

Safety and Security Summary

The most important part of safety and security is prevention and preparation. There will always be risk and as a program leader you will be the person your participants will look to for leadership. Quite often your response can set the tone for the group, so do your best to keep calm and approach each incident with a measured approach. Of course, you too could be scared, nervous, or even panicked when something serious occurs; try your best to keep a cool head and proceed with a sense of calm as it will reassure your group that you are in control and are able to manage the crisis. Program leaders should work with participants to implement all preventive actions possible while traveling (using money belts, not drawing attention to oneself, using the buddy system, not leaving drinks/food unattended, etc.).

In addition, Program Leaders should be very familiar with the Preliminary Incident Information Report and with the step by step action plans for various kinds of emergencies. The more familiar you are with these plans, the easier it will be to follow them should you happen to face an actual emergency.

Conduct/Discipline Issues and Program Withdrawal (Voluntary and Involuntary)

Minor behavior problems

Minor behavioral problems may not be serious enough to warrant immediate removal from a program, but they clearly have a negative effect on the program. In addition, behavior that is allowed to continue may affect the atmosphere and morale of the entire group. Minor problems may escalate into major problems.

Examples of minor behavioral problems include:

- Excessive tardiness to class or class activities
- Conflicts between program participants
- Indifferent or rude behavior towards guests/guest speakers

Depending on the circumstances, you may wish to discuss the problem individually with the participant or participants involved, or allow it to be openly discussed during a general debriefing session. If you discuss an issue with the group, to ensure compliance with federal privacy laws, do not identify specific individuals in the discussion. You can address unacceptable behaviors in general, but cannot name students specifically. You also may wish to consider having one, a few, or all participants sign a behavioral contract (see examples under “Community Building”). If you are unsure as to how to address certain problems, feel free to contact the SAA, to discuss your concerns.

Whether the behavioral problems are minor or significant, make a written record of your observations and discussions with the participant. Never promise confidentiality, as you are required to report all behavior concerns to the university. There is truth in the statement that “Your pen is your power.” This can be especially effective if the participant is using foul language or making accusations. Let a misbehaving participant displaying disorderly behavior know that even though using foul language may not result in a conduct violation, their choice of words can disrupt the classroom and learning environment, and as such you will document his/her exact words in case their behavior worsens and escalates. Asking the participant to repeat the words while you are writing it down can often be an effective way to prevent future verbal confrontations. Email spartansabroad@sjsu.edu for any such behavioral problems that warrant it, to document both the incident and your response. We will collect the information to record and report disciplinary incidents to Student Conduct and Ethical Development.

If, after working with the SAA, the participant’s behavior persists to the point of warranting removal from the program, the on-site Faculty Leader will consult with the Director of the SAA regarding the removal. (See “Procedures for Immediate Removal” in the following section).

Please note that you should not discipline participants for behavior during their own time that does not violate established program or university rules, even though you may disapprove of it. If such behavior violates program rules (such as being required to stay in program accommodations or not traveling alone at

night), then it violates guidelines set forth in the [Commitment to Participate Form \(Appendix E\)](#) and you may follow the suggested disciplinary procedures.

Major behavior problems

San José State University expects study away participants to abide by the laws, regulations, and customs of the host country, community, institution and program. There are certain areas under which the faculty/staff program leader, local resident director or designated SJSU staff has the authority to immediately remove a participant (with approval from SAA and CPGE) from a study away program (see *Procedures for Immediate Removal*). Any behavior that endangers oneself, another person, or property can result in immediate removal. Examples of such behaviors that may result in immediate removal from the program include, but are not limited to:

- Conduct that endangers oneself, another person, or property and violates aspects of San José State University's Code of Student Conduct
- Violation of the laws, rules and regulations, or customs of the host country, community, institution and/or program
- Behavior that is disruptive and detrimental to the group learning process and academic success of the program
- Conduct that damages or destroys property of another person, institution, or organization
- Behavior that gives the program leader and the SAA reasonable cause to believe that the continued presence of the participant in the program constitutes a danger to the health or safety of themselves, persons or property, or threatens the future viability of the program
- Repeated offenses or severe infractions of the housing rules and regulations as established by the local facilities
- Repeated behavior for which the participant has been warned in writing
- Alcohol misuse (as defined below under "Alcohol use and misuse")
- Use of illegal drugs (this is prohibited, as it is on campus)
- Criminal acts such as:
 - physical or sexual assault
 - harassment
 - possession, use or distribution of illegal drugs
 - setting a fire or possession of explosives

- possession of a weapon
- theft

A participant who is removed for disciplinary reasons will be responsible for airfare and any other expenses associated with early removal from the program; grades are assigned as described in the previous “Voluntary Withdrawal - Participant Withdrawal Onsite” section.

Drug use and alcohol abuse and misuse

The use of illegal drugs on an FLP is prohibited, just as it is on campus. It is illegal for a participant to possess, consume, furnish, manufacture, sell, exchange or otherwise distribute any alcoholic beverages except as permitted by host country laws and local institutional regulations. Alcohol misuse and abuse are not tolerated anywhere in the world and will not be tolerated on an FLP. Violation of local laws and/or SJSU regulations or policies may result in (i) immediate removal from the program; (ii) academic withdrawal from the University for the semester in progress; and (iii) disciplinary action upon return to campus. (This section is taken from item #2 text of the [Commitment to Participate Form that all participants sign, Appendix E](#)).

The following provides guidelines for responsible alcohol use. This message is reinforced in the SAA general pre-departure orientation and should be emphasized during your program-specific orientation. In addition, responsible use of alcohol should also be discussed at the on-site orientation.

Alcohol misuse is defined as any use that is harmful or potentially harmful to self or others. Alcohol abuse is planned, systematic misuse of alcohol. What is “alcohol misuse?” Alcohol misuse is present when:

- A participant misses any scheduled event because of the effects of alcohol consumption;
- A participant becomes ill due to the effects of alcohol consumption;
- A participant is disrespectful of others sharing the same housing when alcohol consumption leads to disruptive, loud socializing;
- A participant engages in inappropriate behavior toward other individuals that is the result of alcohol consumption;
- A participant engages in destructive behavior toward property that is the result of alcohol consumption;
- A participant does not abide by the laws of the country in which he or she is staying;
- Participants facilitate/encourage or ignore a fellow participant who is misusing or abusing alcohol;
or
- Transporting quantities of alcohol to program sites with the intent of sharing the alcohol with members of the group.

Alcohol misuse and abuse should not be tolerated on FLPs.

Participants must be encouraged to use good judgment if consuming alcohol at private homes or other accommodations during non-program hours. Encourage participants to discuss with you the misuse or abuse of alcohol by other participants that distracts from their positive experience with the program. Encourage participants to look out for each other and keep each other safe.

Alcohol poisoning / overdose

It is extremely important to be sure participants understand that if a participant becomes incapacitated due to alcohol overuse, or if he/she is in need of medical attention, others should immediately contact a local emergency medical service, faculty/staff leader and/or resident director, in order to protect the health and well-being of the affected participant. The individual needing medical attention should be referred for assistance to address issues of chemical use/abuse. Peers must make the responsible choice to notify program or emergency personnel quickly. The person (or persons) making the call should not be subject to disciplinary action.

Faculty Leaders must also keep in mind their own role with regard to the use of alcohol in light of these policies. If participants are individually purchasing alcohol at a group function, it is your responsibility to monitor responsible alcohol use by both you and the participants. While you are not ultimately responsible for an individual participant's alcohol consumption, you can be liable if shown to encourage it. As a faculty leader, you are a role model and must carefully consider your own use of alcohol in settings with participants. You are also in a position of authority and responsibility and you must be capable of addressing an emergency should it arise.

Participation in and/or accompanying participants to social events that involve excessive consumption of alcohol implies that alcohol misuse is acceptable and sends a contradictory message regarding responsible drinking. Additionally, consuming alcohol with a participant could open faculty up to a Title IX charge, if a participant perceives and alleges that a faculty member used their position and the consumption of alcohol to pressure a participant. In other words, refrain from participating with participants in social events that involve excessive consumption of alcohol.

Conduct issues related to housing

Housing officers, host families, and hotel staff will expect SJSU faculty/staff and personnel to share responsibility for informing participants of host housing rules and regulations; encouraging participants to abide by the local regulations, and mediating conflicts that arise.

Individual programs will make use of a variety of different models in providing housing. Program leaders may wish to provide participants with policies specific to the housing model of their program. In particular, participants must be made aware that their behavior could result in their removal from contracted housing, by housing officials. This would lead to removal from the program as described in the section above titled "Major Behavior Problems."

Minor infractions of housing regulations are dealt with as above: Program Leaders will email a description of the infraction to spartansabroad@sjsu.edu and follow procedures outlined in the section on “Immediate Removal” and described in the [Commitment to Participate Form \(Appendix E\)](#).

If it is agreed that the behavior does not constitute immediate removal, but instead constitutes a warning, you should notify the participant in writing that a repeated offense or other infraction of the housing rules and regulations as established by the local facilities will result in expulsion from housing and removal from the FLP. Document the infraction and the participant notification, as with any minor infraction.

Addressing behavioral problems

The previous sections have described typical minor and major behavioral problems. However, the best way to handle disciplinary problems is to avoid them in the first place. Seasoned program leaders recommend discussing participant behavior problems and creating program-specific codes of conduct that participants read and sign on arrival. Examples and suggestions are included in the discussion of “*Community Building*” in this handbook.

As a condition of acceptance, to participate in an SJSU study abroad program, every participant has signed the [Commitment to Participate Form \(Appendix E\)](#). This statement, particularly item #4, lists the SAA’s Removal Policy. In discussing conduct and discipline with participants, please refer to this document.

In the event of an incident/infraction where there is an allegation of a violation of the laws, regulations, and customs of the host country, community, institution or program or a violation of the SJSU Code of Student Conduct, but does not cause immediate danger to others, the following procedures will apply:

1. VERBAL NOTIFICATION: The program leader, on-site resident director, or program assistant representing the SAA will have a frank discussion with the participant(s) involved concerning expectations and consequences, giving the participant(s) an opportunity to respond in person. Email spartansabroad@sjsu.edu concerning the issue and inform the participant. This will serve as documentation and provide written clarification to the participant.
2. WRITTEN NOTIFICATION: If the discussion does not result in mutual understanding and if the behavior continues, consult with the SAA regarding the violations. Suggested template language can be provided to warn the participant in writing of the expectations and consequences.

A warning statement might include:

- Date
- Location
- Detailed description of the undesired behavior, and why it was considered inappropriate.
- Clearly stated expectations and consequences (including restricted activities, if applicable) that will remain in effect for the duration of the program.
- Indication that this statement represents a final warning and any continuation of the undesirable behavior will result in immediate removal from the program.

3. REMOVAL: If after discussion and consultation with the SAA it has been decided to remove the participant from the program, take appropriate action and inform the participant in writing of the decision.

Depending on the severity of the case, one or more of the following should apply:

- Written removal from the study away program provider/partner (which automatically means voluntary removal from the FLP for that summer/winter session). The SAA, the Dean of CPGE, and/or the Provost will facilitate any removals.
- Report submitted to the SAA, to become part of the participant's record. This report will be referred to the Student Conduct and Ethical Development Office and may include a hearing upon return to San José State University.
- Other actions deemed appropriate to the specific case
- Academic credit and grade will be awarded according to University policy (see "Withdrawal" section.)

Unauthorized Travel

If a participant is absent for more than 24 hours from the program, the program leader will seek to determine the location of the participant. If the participant cannot be located, it will be considered an emergency situation and the program leader must inform SAA so that SAA can contact the participant's emergency contacts listed on their application. If, after investigation, it is determined that an emergency situation does not exist, the participant will receive written warning that such absences are a violation of SJSU FLP Independent Travel Policy:

For programs that include free-time, participants must provide all travel plans to the Program Leader in advance. Additionally, participants who choose to travel independently during their scheduled FLP cannot travel further than 3-5 hours' distance from the program site **within** the host country.

Participants who violate the SJSU FLP Independent Travel Policy and/or other participant policies should receive a written warning, notifying the participant of their unacceptable behavior. Repeat or an accumulation of offenses could be cause for removal from the program.

A participant who, through his or her absence, demonstrates that he or she has withdrawn from the program during the Faculty-Led Program without obtaining an official withdrawal will be reported as having failed the course(s).

A participant who leaves the University without formally withdrawing forfeits any fees or deposits paid to the University. The participant will continue to receive and be responsible for payment of tuition and course fees and FLP program fees.

Procedures for immediate removal

If the participant has committed a violation that requires immediate removal, or the participant has committed a lesser violation and the procedures under "*Addressing Behavioral Problems*" have been

followed and reached the removal stage, the SAA will review the course of action for removal with you and the Dean of CPGE.

Once removal is approved, document the violation(s) and response in writing, email the SAA (spartansabroad@sjsu.edu), and provide a copy to the participant. In this letter the participant should be informed that he/she is no longer considered a participant in the program and must leave the residence/program site by a designated date and time. Have the participant sign and date the statement acknowledging that he/she is no longer a participant. If the participant refuses to sign the statement, have a witness sign a statement indicating the participant has been removed but refuses to sign the form.

Also inform the participant that a report will be filed and he or she may face additional penalty through the Student Conduct and Ethical Development Office .

If a participant is removed for disciplinary reasons during an FLP, grades are assigned as described in the previous “Voluntary Withdrawal - Participant Withdrawal Onsite” section.

Appeals

Because of the nature of an FLP, participants have a more limited right to appeal disciplinary decisions than they do on campus. Participants on an FLP have the right to appeal a decision to remove or otherwise penalize them. This appeal must be initiated within 24 hours of receiving written notification of the penalty or removal from the Program Leader. The appeal will be addressed to the Dean of CPGE, who will respond as quickly as possible. A decision to uphold the removal or penalty will be final.

Community Building

Seasoned study away Program Leaders will report their biggest challenges abroad are not emergency situations, public transportation strikes, fluctuating currencies or language barriers, but participant behavior problems. Those who have successfully traveled with participants for many years advocate discussing appropriate participant conduct and behavior-related problems in the pre-departure orientation, as well as upon arrival.

To begin, reinforce the message that an FLP is an academic experience, and that academic responsibilities take priority over personal interests. Planting this idea helps to combat the notion that study abroad is “time off” from school. Also, refrain from referring to the experience as “a trip,” but instead use the word “course” or “program” as it denotes a difference between study abroad and a vacation.

Reinforce the concept of participants as “cultural ambassadors” and emphasize that their conduct will be seen as representative of the United States and San José State University. Participants need to be reminded that while the consequences of poor behavior at SJSU may reflect solely on themselves, their misconduct abroad will be attributed to the entire group. In addition, be honest with your participants about how their poor behavior reflects poorly on you, as the Program Leader, to your local colleagues. Most importantly, participants need to understand that the viability of a program rests in their hands. Offensive or indifferent behavior resulting in negative evaluations by colleagues abroad could lead to the cancellation of this and future programs.

Next, consider creating a “Participant-Program Leader” contract, specifically tailored to your program. You can create one in advance (see following examples), or employ a method of community building similar to that used in the residence halls. Ask participants to identify acceptable and unacceptable behaviors which the group can agree upon and create a “contract” that the participants sign on-site. In addition to the expected, “don’t be late for bus departures,” ask participants to decide on actions to avoid such situations. For example, participants can agree to check that everyone is awake at a certain time, or phone a classmate after their alarm has rung. The participants may also agree upon consequences and/or group responses to repeated offenses. Likewise, participants should be informed of the procedure to follow if they experience the consequences (for instance, if they are left behind because they missed the field trip departure). There is no need for complete agreement – consensus should be the desired goal.

It may be more important to emphasize what the participants should *do*, rather than what they should *not* do. This applies to bystanders. For instance, if one participant sees another participant displaying inappropriate behavior, that participant should step forward to stop it. Encourage this type of response, as well as the peer pressure that participants with leadership skills can provide.

If you experience excessive complaining, the group could set specific times during the day when all complaining is allowed. None is allowed throughout the rest of the day. This may seem like an extreme action, but it’s been proven to work.

Ask participants to discuss how personality conflicts can undermine the atmosphere of the program. Although it may seem like common sense, you may need to regularly remind participants to...

- be polite and listen to one another;
- respect each other, leaders and local people affiliated with the program;
- honor diversity and differences within the group;
- fight fair and attack the problem, not people; and
- look for compromises.

Require participants to determine procedures and methods for dealing with personality conflicts. Participants are often more likely to adhere to rules and repercussions that they have decided upon as a group.

You may wish to address sex and dating among program participants, as well as with locals. Pre-departure discussion regarding the local culture’s receptivity to public displays of affection, LGBTQIA+ participants, and other issues may help to alleviate misunderstandings.

Furthermore, address your concerns for alcohol misuse and abuse. In addition to posing a health and safety risk, alcohol abuse is the primary source of behavioral problems and personality conflicts between group members. By addressing this issue in advance, you not only inform participants of your concerns, but also alert them to possible past problems that have had a negative effect on the program. Many FLP Program

Leaders have commented that this proactive approach has been successful in reducing the number of alcohol-related problems.

To begin this discussion, it is helpful to ask participants to discuss the consequences of alcohol misuse, such as the following:

- Tardiness or poor attendance at classes and activities
- Negative participant interactions as a result of alcohol-induced “bad” behavior
- Animosity/break down of community among members due to such behavior
- Poor reflection of group to local community/faculty/contacts
- Undue stress to program leader that requires excessive attention and time

Brainstorm with the participants on their perception of alcohol use in the host culture, comparing and/or contrasting with alcohol use in the United States. Share your knowledge of alcohol use in the host culture and remind participants of the difference between alcohol use and alcohol misuse/abuse. Excessive drunkenness is not tolerated in any country, and is, in fact, considered an illness/addiction in many cultures.

Lastly, review this conversation after arrival, and a few days/weeks into the program. Be alert to group dynamics and address any concerns you may perceive. Don’t make light of incidents of abuse (such as joking about hangovers). Make sure you follow up on your stated consequences. Do what you said you would do if participants violate agreed-upon rules.

Examples of pre-made participant-program leader agreements

Adapted from a contribution by

Paul Roberts, College of Agriculture and Natural Resources, MSU.

It is expected that participants in the study away program will display proper respect and sensitivity to the host culture, as well as to participants and faculty members of the program.

I understand that personality conflicts can undermine the atmosphere of a study abroad program. Therefore, I agree to display respectful behavior to all members of our group. I understand discourteous or uncooperative behavior, cultural insensitivity, tardiness for group functions and/or conduct that is disrespectful to other individuals, and disruptive and detrimental to the academic success of the program will result in removal from the program or a severe grade penalty.

Decisions regarding removal, grade penalization and inappropriate behavior are the sole discretion of MSU [accompanying] faculty.

I have had the opportunity to ask questions about this policy, understand its terms, and agree to the terms stated.

Print name

Sign name

Date

Contributed by Larry Besaw, College of Natural Science for "Natural Science in the Canadian Rockies" MSU.

I understand that I must comply with all National Park Policies, such as:

- no collecting of any kind
- stay on trails at all time
- no "cutting" switchbacks
- no feeding of animals
- no littering

I understand that I must comply with 10:00 p.m. "Quiet Hours" in all campgrounds and hotels.

I understand that drinking [alcohol] is allowed at permissible times in the program if I am at or above the legal drinking age, and that there is a zero tolerance for anyone drinking to excess which results in intoxication to the point of impairment of physical and mental faculties. I understand that any individual who violates this policy will result in a ZERO drinking policy for the ENTIRE group for the rest of the program, and that it is my responsibility to not only monitor and control my own drinking, but to also remind group members of the drinking policy if I observe them drinking to excess.

Print name

Sign name

Date

Additional on-site group dynamic issues

Act as liaison between the participants and resident directors/tour guides/hotel managers, etc. as well as those individuals providing services related to class activities. If cross-cultural issues or concerns regarding interpretation of the host culture arise, consult a local contact, when such people are available.

Cross-cultural misunderstandings with host families, host country instructors, etc., may be avoided if you rely on the local knowledge and expertise of these individuals. For housing problems, see "Housing Issues" under *Major Behavior Problems*.

If your program moves regularly, you may wish to intentionally rotate roommates to mix up the participants, avoid cliques, and stimulate greater full-group interaction.

On short-term programs, participants and program leaders are in constant, daily contact. Yet it is still important to set aside time for group check-in sessions. Program Leaders have reported highly successful sessions specifically arranged to discuss and share impressions, cross-cultural adjustment, personal activities, inappropriate behavior, etc. These sessions can also help to build group cohesiveness and alleviate possible cliques and divisions.

Be aware of and take note of accessibility for participants with disabilities. Although you may not have a participant with disabilities on your current program, this information may prove useful in the future.

Take a group photo on site, preferably with some of the participants wearing visible SJSU attire. These photos can be used for program-specific and general promotion and publicity. Make sure all the participants have signed their photo release; it would be a shame to take a group photo only to learn the participant in the front didn't agree to use their photo in marketing materials.

Cultural Transitions

You will have both an academic and disciplinary role with the participants. You should decide on your expectations and limits, and communicate those to the participants during pre-departure and on-site orientations.

Be aware of possible indicators of cultural transitions or transition stress (sometimes referred to as “culture shock”) that include: compulsive eating or lack of appetite; feelings of helplessness, irritability, and loneliness; homesickness; sleeping more than usual; feeling depressed; getting angry easily; decline in inventiveness, spontaneity, or flexibility; stereotyping of host country/culture; increase in physical ailments or pains; inability to work effectively; boredom; or unexplainable crying. Most study abroad participants will experience some form of transition stress. However, some might experience it after only two days in the host country, others not until several weeks into their stay. In addition, the concrete indicators of transition stress vary from individual to individual.

Encourage participants to take care of their health and eat well to help them through these stages. If your participants display one or more of these behaviors, it is very likely that they are experiencing transition stress as part of cross-cultural adjustment. When this happens, take the time to speak one-on-one with them. They may not even be aware that what they are feeling is transition stress; by calling their awareness to it you can then help them decide the best coping mechanisms for them to use while working through the transition stress process.

Returning Home

Reverse Cultural Transitions

Many participants can expect to experience some measure of reverse cultural transitions or transition stress. In fact, many participants who report having little or no transition stress upon arrival in a new culture do report significant reverse transition stress after returning home. Remind participants that the world at home didn't stop while they were gone. Upon return home, participants may find they aren't the

only ones who have changed during their absence. Everyone and everything else will have changed too! Remind them to take time to readjust slowly.

Suggest some of the following ways to use the interests and skills they gained abroad:

- Talk with participants from the program or others who have studied abroad.
- Enter the FLP photo contest.
- Go to a workshop offered with the Career Services Office on how to incorporate your cross-cultural experiences into your resume and how to talk to potential employers and graduate schools about the value of these experiences.
- Share their experiences by working as an SAA Global Ambassador.
- Participate in an SAA fair or info session. Let participants know how they can help staff your program's display or participate in a similar promotional event.
- Talk about their experience to clubs, groups, and organizations on campus.
- Study a foreign language or take courses with an international focus.
- Write an article for *The Spartan Daily* or their local home paper.
- Continue studying the host country by taking related courses, reading international papers, viewing films and videos, writing research papers, etc.
- Volunteer to work in the community or on campus. Help organizations that support community service and development. Look for groups working with immigrants, refugees, or the aged so they can use their skills of listening, patience and empathy.
- Start thinking about when and how they can return abroad. They can study abroad again on another FLP, or go longer for a semester or academic year; apply to graduate schools abroad; apply for Fulbright or other scholarships to study and conduct research; find employment possibilities where they were abroad; join the Peace Corps; or just return to visit host family & friends.
- Integrate the best of each culture. It is not necessary to give up one at the expense of another!

We hope you have a wonderful Faculty-Led Program experience!

Appendices

Appendix A - Executive Order 1081



BAKERSFIELD

CHANNEL ISLANDS

December 6, 2012

CHICO

DOMINGUEZ HILLS

MEMORANDUM

EAST BAY

TO: CSU Presidents

FRESNO

FROM: Charles B. Reed
Chancellor

FULLERTON

HUMBOLDT

SUBJECT: Study Abroad and Exchange Programs — Executive Order 1081

LONG BEACH

LOS ANGELES

Attached is a copy of Executive Order 1081 relating to international study abroad and exchange programs.

MARITIME ACADEMY

In accordance with policy of the California State University, the campus president has the responsibility for implementing executive orders where applicable and for maintaining the campus repository and index for all executive orders.

MONTEREY BAY

NORTHRIDGE

If you have questions regarding this executive order, please call Academic Affairs at (562) 951-4790.

POMONA

SACRAMENTO

CBR/gsb

SAN BERNARDINO

Attachment

SAN DIEGO

c: Executive Staff, Office of the Chancellor

SAN FRANCISCO

SAN JOSÉ

SAN LUIS OBISPO

SAN MARCOS

SONOMA

STANISLAUS

401 GOLDEN SHORE • LONG BEACH, CALIFORNIA 90802-4210 • (562) 951-4700 • Fax (562) 951-4986 • creed@calstate.edu

THE CALIFORNIA STATE UNIVERSITY
Office of the Chancellor
401 Golden Shore
Long Beach, California 90802-4210
(562) 951-4790

Executive Order: 1081
Effective Date: December 6, 2012
Supersedes: Executive Orders 605, 744, 745, 998 and 1022
Title: Study Abroad and Exchange Programs

This executive order is issued pursuant to Sections 89705 (b), 89706, and 89707 of the Education Code; Sections 40100, 40102, 41800.1, and 41912 of Title 5, California Code of Regulations and pursuant to the Board of Trustees Standing Orders, Section II (a) and (c). The California State University recognizes the education-related benefits of international study abroad and exchange programs, and the integral role they play in the mission of the institution, as well as the importance of minimizing risk, both to participants and the university.

I. Purpose

This executive order establishes requirements for campuses to establish study abroad and/or exchange programs as a part of their international activity in state and self-support endeavors. International activities should be connected to the university mission, and this connection should be understood and coordinated among all of the university's stakeholders. International activities shall be overseen centrally on the campus to ensure that: (i) there is a clear benefit to the CSU; (ii) they are a part of the university's overall mission to educate the citizens of California; and (iii) all study abroad/exchange programs are being implemented and monitored consistently.

II. Delegation of Authority

The president of each campus is delegated the responsibility for the development, implementation, and oversight of international programs in accordance with existing CSU policy. All international agreements must be signed by the campus president in accordance with the following provisions. This authority may not be delegated.

III. International Student Exchanges (Education Code §89705 (b))

Campus presidents may initiate agreements with foreign institutions of higher education, governmental agencies, or nonprofit corporations or associations in order to enhance the education of CSU students and to enhance international goodwill and understanding through

Executive Order 1081

the exchange of students. Campuses may also participate in student exchange agreements entered into by a United States government agency or nonprofit organization with a similar agency, corporation, or organization. All such agreements must go through the Chancellor's Office review and approval process set forth in Executive Order 1080 (International Agreements).

- A. Campus presidents or their designees may waive nonresident tuition fees for foreign students attending a campus of the CSU under such an agreement if the following conditions are met:
 1. The foreign institution, agency, corporation, or organization is domiciled in and organized under laws of a foreign country.
 2. Any student receiving a waiver of tuition under such an agreement is a citizen and resident of a foreign country and not a citizen of the United States.
 3. The agreement provides that comparable expenses are paid or waived by the foreign entity entering into the agreement. Comparable expenses may be provided in the form of matching tuition waivers at a foreign educational institution, provision of services, or a combination thereof. Campus policy should define equivalence between varying term or session lengths and the period of time in which balance will be achieved. Comparable expenses must be student instruction related and may not include faculty or staff visits or accommodation or meals for university employees.
 4. The exchanges must balance over a documented period of time not longer than the term of the agreement. Campuses must maintain documentation on the balance of incoming and outgoing students participating in the exchange.
- B. Acceptable methods of paying fees other than nonresident tuition include the following:
 1. The foreign student pays the CSU campus, and the CSU student pays like fees on the foreign campus.
 2. The CSU student pays fees at the home campus, and the foreign student pays like fees at the foreign campus.
 3. Fees are paid from a non-state source.
- C. As a condition of issuing to the incoming exchange student the documents necessary for the student to obtain a visa (J-1), campuses shall obtain from all applicants their agreement to obtain and maintain insurance coverage for health, medical evacuation, and repatriation during their period of enrollment in the CSU. Campuses shall inform all applicants that adequate coverage will be required as a condition of registration

and continued enrollment, and shall, at their option, require or “strongly encourage” that any accompanying dependents procure health insurance that is comparable to what is required for students. Campuses shall furnish applicants information on where acceptable insurance may be obtained. Campuses shall ensure compliance with this requirement at the time of registration by requiring certificates of insurance or other evidence of coverage.

IV. Study Abroad Programs

Study abroad is any CSU credit bearing campus program which is in whole or part conducted outside the United States, is not a degree program and is normally one year or less in duration. Study abroad programs are primarily intended for matriculated CSU students. The following policies and procedures apply to the development, administration, and conduct of all campus based study abroad programs:

- A. Study abroad programs shall undergo a standard on-campus development process which incorporates all appropriate administrative and academic reviews as defined by the sponsoring CSU campus curricular process.
- B. Study abroad programs shall present a coherent, thematic course of study which is congruent to or adjunct with the campus curriculum and which relates to the overseas site.
- C. Campus presidents, or their designees, shall incorporate plans for the review, evaluation, and improvement of the study abroad program as a regular feature and condition of its operation.
- D. Campus based study abroad programs may not duplicate the offerings of the CSU Office of International Programs.
- E. Study abroad programs shall be conducted consistent with the provisions of other related executive orders (such as those on air travel, risk management, special sessions).
- F. All CSU study abroad programs (including when CSU students participate in an exchange or in a third party program) must consider the health, safety and security of students, staff, and faculty as a central feature of planning and operation and must:
 1. Not operate in countries where there is a U.S. State Department “Travel Warning” unless an exception is granted by the chancellor.
 2. Provide a training session for staff or faculty who will lead programs abroad. This training should include emergency response training, communication from abroad, student conduct code, alcohol and drug policy, and disciplinary procedures in addition to other country or program specific information.

3. Provide prospective students with information about the program, including location, duration, academic program, and total cost.
4. Include a pre-departure orientation about the destination including health, safety, security, specific legal exposure or political restrictions related to their status in the country, CSU or campus policies and procedures for study abroad, and financial information.
5. Require students to carry medical insurance including medical evacuation and repatriation coverage that will be valid in the host country(ies).
6. Advise appropriate host country authorities of the program where appropriate or required, including locations, duration, and academic program.

G. Documentation:

1. All students are required to sign the CSU liability release and the campus must maintain signed copies on file.
2. Campuses must maintain basic student information for participants including name, contact information, program, emergency contact information, insurance information, date of birth, student ID number and major.

V. Study Abroad Through Non-CSU Program Providers

Presidents may enter into agreements with study abroad program providers including entities not affiliated with the California State University. A program provider is an organization that sponsors instructional programs abroad that are open to students from colleges and universities.

Federal financial aid regulations require that campuses make financial aid available to otherwise eligible students who participate in study abroad programs when the program is approved for academic credit. There must also be a written agreement with the foreign school, or with another U.S. school that contracts with the foreign school, or an agreement with the study abroad organization (program provider) in place of the agreement between the home school and the foreign school. These agreements must go through the Chancellor's Office review and approval process set forth in Executive Order 1080 (International Agreements).

- A. Each CSU campus must have a written process for approving study abroad program providers and for deciding whether to enter into an agreement with a program provider. In approving program providers, and before entering into an agreement, the campus shall consider:

Executive Order 1081

1. The academic and curricular offerings of the program.
 2. The student services available through the program provider.
 3. The health, safety, and security preparedness undertaken by the program provider.
 4. The cost to the student.
- B. In the course of cooperating with a program provider, neither a CSU campus nor any employee or agent of a CSU campus shall accept payments or benefits in exchange for being an approved program or recommending the program to students. This includes, but is not limited to the following:
1. Payment of conference or training registration fees, transportation, or lodging costs for an employee of the campus.
 2. Fees for advertisements in official publications of the campus or international office that are designed to explain the students' program options.
 3. Payment of site visit costs in conjunction with program familiarization or program oversight responsibilities.
 4. Payments per number of students recruited.

This executive order may be augmented by guidelines consistent with its provisions by the executive vice chancellor and chief academic officer or designee.


Charles B. Reed, Chancellor

Dated: December 6, 2012

Appendix B - Executive Order 1022

Executive Order No. 1022

THE CALIFORNIA STATE UNIVERSITY
Office of the Chancellor
401 Golden Shore
Long Beach, California 90802-4210

Executive Order No.: 1022
Effective Date: September 24, 2007
Supersedes: No Prior Executive Order
Title: Study Abroad Through Non-CSU Program Providers

This executive order is issued pursuant to Title 5, California Code of Regulations, Sections 40100 and 40102. The purpose of this Executive Order is to establish principles for CSU campus interactions with non-CSU study abroad program providers for California State University students.

1. Presidents of the campuses of the California State University, or their designees, may initiate study abroad programs which support, enrich, and/or broaden existing curricular offerings in accord with Executive Orders 744 or 745.
2. Presidents of the campuses of the California State University, or their designees, are delegated the authority to enter into affiliation agreements with study abroad program providers, which includes entities not affiliated with the California State University.
3. A "program provider" is an organization or university that sponsors instructional programs abroad that are open to students from colleges and universities.
4. "Study abroad" means any credit bearing instructional program which is in whole or part conducted at a site outside of the United States of America, is not a degree program, and is normally one academic year or less in duration.
5. Federal financial aid regulations require that campuses make financial aid available to otherwise eligible students who participate in study abroad programs provided the program is approved for academic credit. There must also be a written agreement with the foreign school, or with another U.S. school that contracts with the foreign school, or a single written arrangement with a study abroad organization (program provider) to represent an agreement between the home school and the foreign school.
6. Each California State University campus should have a process for approving study abroad program providers and whether to enter into an agreement with a program provider. In

Page 1 of 2

approving program providers, and before entering into an agreement, the campus should consider:

- a. The academic and curricular offerings of the program;
 - b. The student support services available through the program provider;
 - c. The health, safety, and security preparedness undertaken by the program provider;
 - d. The cost to the student.
7. In the course of cooperating with a program provider, neither a California State University campus nor any employee or agent of any California State University campus shall accept payments or other benefits in exchange for being an approved program. This includes, but is not necessarily limited to, the following:
- a. Payment of conference or training registration fees, transportation, or lodging costs for an employee of the campus;
 - b. Fees for advertisements in official publications of the campus or international office that are designed to explain the students program options;
 - c. Payment of site visit costs in conjunction with program oversight or program familiarization responsibilities.
8. This executive order may be augmented by guidelines consistent with its provisions by the System Chief Academic Officer, or designee.



Charles B. Reed, Chancellor

Date: September 24, 2007

Appendix C - FLP Safety and Security Document

What is the local equivalent of 911?		Country	Number

US Embassy (Country)	Contact Name	Cell	Landline	E-mail	Address	Group registered?
1						
2						

Hospital Name (closest to lodging sites)	Contact name	Phone	E-mail	Address
1				
2				
3				
4				

Doctor Name	Cell	Landline	Address

Police Station Name (closest to lodging sites)	Contact Name	Address	Cell	Landline	E-mail
1					
2					
3					

Disaster Meeting Points (2 per lodging site)	Emergency contact name	Emergency contact cell	Emergency contact landline
1			
2			
1			
2			
1			
2			
1			
2			

Guides	Location	Dates	Company name	Contact Name	Cell	Landline	E-mail	Cost

Lodging Name	Contact Name	Cell	Landline	E-mail	Address	Dates

3rd Party Organization/Company Name	Contact	Cell	Landline	E-mail	Address
COVID-19 testing sites (closest to lodging sites)	Cost	Phone	E-mail	Address	
1					
2					
3					
4					
COVID-19 quarantine lodging locations (if needed)	Contact	Phone	E-mail	Address	
COVID-19 quarantine staff name (who will stay behind with a student)	Dates available	Cell	Landline	E-mail	Address
Faculty Travel Information					
Dates of personal travel	Dates of FLP/Business Travel		Time/date of flight Departure from US	Time/date of flight Return to US	
Transportation Hubs (near lodging sites)					
1		Address	This information is needed in case Program Leaders are not reachable and students call SJSU for help finding transportation. Only major subway, bus, train, and airports in remote locations are needed.		
2					
3					
4					
Please provide to SAA: Copies of front passport page for each Program Leader and copies of visas for each Program Leader (if relevant)					

Appendix D - FERP and FLP (Excerpt from [FAQs](#))

FAQ s for the FERP Program*

*Note that the FAQs provide answers to the FERP program outlined in the current CSU-CFA Agreement. These FAQs are meant to answer your questions in general. For more information about your situation, please contact University Personnel at 4-3737 to schedule an appointment.

Who may apply for FERP? –Tenured instructional faculty, librarians, and counselors who have reached the age of 55 and have decided to retire, but have not yet done so, are eligible to apply for FERP. The program is not available to Coaching faculty unit employees. Under the terms of the current [CSU-CFA Agreement](#), the FERP program is an entitlement program, as long as the relevant procedures are followed and courses appropriate for the faculty member to teach are scheduled.

When must a faculty member decide whether or not to FERP? – A faculty member must decide whether to FERP before retiring. If a faculty member retires without indicating the desire to FERP, the privilege is lost.

We encourage a prospective retiree to consult with his/her Chair/Director, Library Dean, or Counseling Services Director as early as possible. The FERP application must be completed no later than the last day in February 20XX. The completed application should be submitted to the Department Chair/Director. It will be routed to the College Dean, and University Personnel-Faculty Affairs (UP-FA) for approval.

Which offices must a faculty member notify with intentions to retire and subsequently FERP?

In addition to working with the University Personnel-Faculty Affairs (UP-FA), the faculty member must also notify their Department Chair, their Benefits Representative in University Personnel, and a CalPERS Representative. University Personnel may be reached at 408-924-2250 and CalPERS may be reached at 1-888-225-7377.

Following are two important CalPERS publications that may be helpful to you, "Retirement Planning Checklist": <https://www.calpers.ca.gov/page/active-members/retirement-benefits/service-disability-retirement/retirement-planning-checklist>, & "Employment After Retirement <https://www.calpers.ca.gov/page/retirees/working-after-retirement>

Another office you may contact is the Social Security Administration to discuss Medicare and other benefits. You may reach them at 1-800-772-1213.

What is the duration of the FERP program?– Under the current [CSU-CFA Agreement](#), faculty members who entered into the FERP program may do so for up to five (5) academic years.

When can or must a faculty member begin FERP? – A faculty member can only commence FERP after having been retired. A faculty member can only apply to FERP before retiring. Participation in FERP must start at the beginning of an academic year. Faculty usually apply for FERP in the month of February before retirement.

Examples:

- You retire on July 1. You must have applied for FERP and had your application approved before July 1. Your FERP commences at the beginning of the Fall Semester, regardless of whether you teach that Fall Semester or the following Spring Semester, or both.
- You retire on December 31. You must have applied for FERP and had your application approved before December 31. Your FERP commences at the beginning of the following Fall Semester, regardless of whether you are teaching that Fall Semester or the following Spring Semester, or both.

May a faculty member take a leave of absence while in the FERP program and what is the effect of such a leave?

- A request for a leave of absence without pay will be considered only for reasons of personal illness (that is, the FERP participant's illness) and may extend up to a maximum of one full year within any one fiscal or academic year of FERP eligibility. Under the current CSU-CFA Agreement, a FERP participant is entitled to a **single** such leave during the entire period of FERP eligibility (note that Article 22 does not apply to FERP participants). Any leave time taken, regardless of type or duration, will not extend the total period of FERP eligibility.

For example, if a FERP faculty member takes a one year leave without pay, that faculty member would then actively participate in FERP for only the total number of years minus one. The year of leave may not be added to the end of the FERP period to extend the period of eligibility.

The University is committed to complying with both the Federal Family & Medical Leave Act (FMLA) and with the California Family Rights Act (CFRA) and does so under the terms of the Revised CSU Family Medical Leaves (FML) Policy (Technical Letter HR 99-05, dated 5-7-99). Under the terms of this CSU policy, FERP faculty, like all other faculty, are eligible for FML for any one of the following reasons:

1. To care for a child following the birth or placement with the employee for adoption or foster care;
2. To care for the employee's spouse, registered domestic partner, child, or parent (not parent-in-law) who has a serious health condition,
3. The employee is unable to perform the essential functions of his/her job due to a serious health condition.
4. Qualifying Military Exigency Leave (MEL) arising out of the fact that the employee's spouse, registered domestic partner, son, daughter, or parent is on active military duty in the National Guard or Reserve, or has been called to active duty in the National Guard or Reserve in a "contingency" military operation.
5. Service Member Care Leave (SMCL) for a covered service member with a serious injury or illness, if the employee is the spouse, registered domestic partner, son, daughter, parent, or next of kin of the service member.

For numbers 1-4 above, the maximum leave without pay during any year under the FML policy is 12 weeks in a rolling 12-month period beginning with the date that FML commences. For number 5 above, the maximum leave without pay during any year under the FML policy is 26 weeks in a rolling 12-month period beginning with the date that FML commences.

FERP participants are also entitled to both carry-overs up to 48 hours of sick leave into their FERP period and to accumulate new sick leave while in FERP.

The combined effect of these two leave policies is that

1. no requests for leaves without pay will be accepted unless they are either for reasons of personal illness or for other purposes covered under the FMLA policy;
2. under the current CSU-CFA Agreement, only one leave of absence without pay will be granted during the entire FERP period and that leave may be for up to one academic year, but must be for reasons of personal illness only;
3. if a faculty member takes a leave without pay under (2), the first twelve weeks also satisfies the obligation under the FML policy in (3) for that year (12 month period);
4. If one takes FML-qualifying sick leave with pay, that time also satisfies a portion of the twelve-week obligation under the FML policy for that year (12-month period).

May I earn additional compensation through IES, or any other General Fund source while in FERP? - No. According to Technical Letter HR/BEN 2004-08 and pursuant to CalPERS regulations (GC 21227), "a retired person may serve without reinstatement from retirement or loss or interruption of benefits provided by this system [CalPERS] as a member of the academic staff of a California state university, if that service does not exceed, in any fiscal year, a total of 960 hours for all employers or 50 percent of the hours the member was employed during the last fiscal year of service prior to retirement." During the period of FERP participation, both the Agreement provisions and the CalPERS regulations apply.

According to HR/Benefits 2004-08, "CSU employment in summer/special session/extension is not available to participants who are employed at 50% for the academic year (or the corresponding limit for librarians), since they already have reached the allowable employment limit." CSU employees may, consistent with campus policies governing outside activities, be employed outside the CSU system. However, conflicts of interest are not permitted.

May I earn additional compensation through the SJSU Research Foundation while in FERP? - See letter of October 20, 2009 posted on http://www.sjsu.edu/up/docs/FERP_additional_employment.pdf

How much work may a faculty member do as a FERP participant? - A faculty member may choose to FERP for up to 50% of his/her regular time base in the last fiscal year of employment preceding retirement, but no more, in any given fiscal year. For example, if the faculty member had a full-time appointment prior to retirement and entrance into FERP, s/he could **either** work for each of the Fall & Spring semesters or 1.00 for **either the Fall or Spring semester**.

What is the effect on my FERP eligibility of being on leave during the last full year preceding my retirement? - Leave of absence without pay in the fiscal year prior to retirement affects how much FERP faculty may work during FERP.

Example:

- 50% leave without pay in AY 2016-17
- Retired with CalPERS 8/19/17
- FERP beginning AY 2017-18 is limited to a 25% assignment (half of assignment in fiscal year before retirement)
- FERP schedule could be 0.25 FTE AY or 0.50 FTE for one semester

What is the effect on my FERP eligibility of doing a PRTB (Pre-Retirement Reduction in Time Base)? - A pre-retirement reduction in time base effects a permanent reduction in a faculty member's "regular time base," and therefore establishes a less than full-time basis upon which the University must calculate the 50% work load allowed during the FERP eligibility period is calculated.

How much do I earn if I FERP, and what is the effect on my retirement earnings? - Employment under FERP is at the same rank and salary rate as the participant had in the academic or fiscal year immediately prior to retirement, with the total academic year salary prorated by the time base during FERP. At the same time, a faculty member collects full retirement payments. Retirement deductions are no longer taken from the monthly FERP paycheck.

What if, in the year before I retire, I have a 12-month appointment? - For teaching faculty, the FERP program is based upon academic year employment. Teaching faculty who hold a 12-month appointment must be converted to an AY appointment at the time of entry into FERP.

Appendix E - Commitment to Participate Form

Commitment to Participate Statement of Responsibilities

Study Abroad and Away
San José State University

I, _____, have been accepted to participate in a San José State University study away program (Faculty Led Program Name: _____). **I recognize that by signing this agreement I acknowledge my commitment to participate in the Faculty Led Program, for which I have been accepted.** I accept my admission to the program and promise to abide by the following statement of responsibilities:

1. University Policies. I must abide by San José State University policies, including the SJSU Student Code of Conduct, found within the Faculty Led Student Handbook and [online](#) while enrolled in the program. I may be subject to disciplinary action upon my return to campus for violations of those policies.

2. Alcohol and Drugs. As a participant in an SJSU faculty led program, I must abide by host country laws, local institutional regulations, and program rules with respect to alcohol and other drugs. Unless permitted by host country law, local institutional regulations, and the program leaders; I will not possess, consume, furnish, or distribute any alcoholic beverages. I am responsible for knowing and obeying the laws of the host country, as well as all local institutional regulations, and the rules of my specific program regarding alcohol and other drugs. The use of illegal drugs on SJSU faculty led programs is prohibited, just as it is on campus. I understand that violations of law or policy may result in (i) immediate removal from the program; (ii) academic withdrawal from the University for the semester in progress; and (iii) disciplinary action upon my return to campus. Alcohol misuse and abuse are not tolerated anywhere in the world and will not be tolerated on SJSU faculty led programs (see the Faculty Led Student Handbook for details).

3. Host Country Customs. I will abide by the laws and customs of my host country, community, institution and program. I know that I must be sensitive to the social mores of the host culture. I am also subject to the disciplinary codes and processes of any host institution(s) and providers of contracted services. Being sensitive to cultural customs of the host culture may include, but is not limited to the following examples: Dressing appropriately for the host culture; being respectful of local guides, host, and other community members with whom I may interact with as part of my program's curriculum; respecting property of individuals, businesses, and institutions in the host country; etc. **I agree to act respectfully, as I know my behavior will be viewed by local hosts as a reflection of San José State University.**

4. Removal. For all infractions, the disciplinary procedure described in the "Disciplinary Withdrawal" section of the Faculty Led Student Handbook will apply. If I disrupt the group learning

process, if I violate the SJSU Student Code of Conduct, or if my behavior gives the Faculty Leader reasonable cause to believe that my continued presence in the program poses a danger to the health or safety of persons or property, or impedes, disrupts or obstructs the program in any way, I may face removal from the program. Examples of grounds for immediate removal include alcohol, drug and weapons related violations, assault, and sexual or racial harassment.

Before I may be removed from the program, I will have an opportunity to explain my conduct to the program leader(s). A decision to remove me from the program would be made jointly by the program leader(s), the Director of Study Abroad and Away and the Dean of the College of Professional and Global Education. Any decision to remove me would be final and no refund would be made. If I am removed for disciplinary reasons I will be responsible for airfare and any other expenses associated with early removal from the program.

5. Travel. The University may make changes to the program itinerary, including cancellation, at any time and for any reason. Students are responsible for making their own flight arrangements, unless the flight is included in the program fee. As such, the University is not responsible for penalties assessed by air carriers or any other associated costs based on operational and/or itinerary changes when students make their own flight arrangements. Participants are expected to stay in the accommodations arranged for the faculty led program. The University may substitute hotel accommodations or housing at any time. Specific room and housing assignments are within the University's sole discretion.

If I travel independently and arrive after the start of the program, I am responsible for all academic consequences such as lost class time and assignments. I must confirm departure and arrival times and locations with my program leader. If I incur a delayed arrival, I will notify my program leader and the Department of Study Abroad and Away (SAA) personnel. My property is transported at my risk. The University is not responsible for travel delays and inconveniences.

I am financially responsible for any additional expenses incurred to arrive early or prolong my personal travel in the destination location.

I will notify my program leader or on-site personnel of my itinerary whenever I leave the site for personal travel that occurs during the program dates. I will not travel outside of the host country during the duration of the program. The University is not responsible for any injury or loss I may suffer when I am traveling independently or am otherwise separated from any University-sponsored activities. If I become separated from the program group, for any reason, I will rejoin the group at my own expense at the first opportunity.

6. Spouses/Partners, Children, Parents. Faculty led programs are for enrolled San José State University students only; Spouses/Partners, Children, and Parents may not participate on, overlap with, or plan personal/family travel experiences with participants during a Faculty Led Program. If such a person affiliated with me disrupts the program, it may be grounds for my removal.

7. Health. I will be responsible for my own health maintenance. In the event of serious illness, accident or emergency, I will inform an appropriate program official so that assistance may be secured and so that my designated emergency contact may be notified. I agree to disclose my pre-existing mental and/or physical health conditions in entirety on my Medical Form. I understand that a situation arising from such a condition that I have not disclosed in advance which places myself, others, and/or the program at risk may result in my being removed from the program. In the event of an emergency during my time abroad, where there is injury or illness to myself, I hereby authorize any official representative of San José State University or the Host Institution/Partner to secure whatever medical treatment is necessary.

I will check relevant agencies such as the Center for Disease Control and Prevention (CDC) and the World Health Organization (WHO) to check on required immunizations for the country/countries I will visit on this faculty led program. It is my responsibility and choice to obtain any required or recommended immunizations suggested by these agencies in a timely manner prior to my participation on my faculty led program.

8. Acceptance. Upon acceptance into the program I will be billed (on regular SJSU statement) a non-refundable deposit payment of \$500.00 to secure my place in the program. This deposit payment will be applied towards the total cost of the program. If I withdraw from the program after submitting this Statement of Responsibility I will automatically forfeit this non-refundable deposit. I am aware that I will also be responsible for additional program related costs made on my behalf, contingent upon the date on which I formally withdraw from the program; as further outlined in section 9 of this document. I understand that my SJSU account must be current at the time the payment is due in order to participate in a faculty led program. I am aware that my withdrawal after paying my deposit may be very costly, and that my failing to turn in all completed acceptance materials and make payments by the determined deadlines will result in my de facto withdrawal from the program.

9. Withdrawal. If I withdraw from the program after accepting admission I immediately forfeit my \$500.00 non-refundable deposit and will be financially responsible for any payments made or any non-recoverable costs incurred or committed by SJSU and its affiliates on my behalf at the time of my withdrawal, whichever is greater. This may in fact equal the entire cost of the program. I acknowledge that if I withdraw from this program, my non-refundable deposit will not be transferable to a different program.

If I withdraw, I will notify the Department of Study Abroad and Away and my program leader(s) in writing. The date the written notification is received is the date by which the financial calculation will be determined. If a balance is due at the time of withdrawal, I will pay SJSU to cover expenses incurred to that point. If I should decide to withdraw and fail to submit any written notification of my withdrawal and/or fail to show up at the program site, I understand I will be financially responsible for the entire program fee.

If I have received Financial Aid or grant or scholarship funding provided by San José State University for a program from which I withdraw, upon my withdrawal that aid will be reversed and I will be responsible for the entire balance of the program.

If I withdraw from the program prior to the program's first day, I will be required to withdraw from my course(s) and will receive a refund of any tuition and fees (note: this does NOT include non-recoverable costs described above). If I withdraw after the program's first day, refunds for any recoverable tuition and fees will be according to standard university policy, as stated in the Catalog. If I am put on probation or removed from the University after acceptance, it is my responsibility to withdraw from my program.

10. Credit. I will comply with SJSU's academic policies and procedures. I will maintain enrollment for the duration of the program in the specified faculty led program courses.

If I withdraw, depart or am removed from a program before its formal completion, I may be ineligible for academic credit. Should I receive permission to return home early, I may be eligible to receive a grade of "W" on my academic transcript. Deadlines and procedure for receiving a grade of "W" will be according to standard university policy as stated on the web page of the SJSU Registrar.

11. Waiver. In the case of an emergency in which I cannot be reached, I authorize U.S. Embassies and Consulates to release information concerning my welfare and whereabouts to San José State University. In authorizing this release of information, I _____, authorize the Department of State to release all records about me to San José State University and its representatives making this request. I declare, certify, verify or state that, under penalty of perjury under the laws of the United States of America, the foregoing is true and correct (per 22 C.F.R. 171.12(a)).

12. Governing Law. Any dispute arising from this Statement will be determined according to California law.

13. Program-Specific Additions to this Statement. Individual SJSU faculty led programs may, in conjunction with the SAA, establish additional rules and policies regarding issues specific to that program. I will be responsible for reading and understanding these additional rules and I agree to abide by them while participating in the program.

14. Communication. I will respond within 24 hours to all email sent to my sjsu.edu email address from Program Leader(s) or the Department of Study Abroad and Away regarding my participation on this program. I will attend all required classes and meetings and submit all additional required forms by their individual due date. Failure to respond to emails in a timely manner or not attend and participate fully in any and all aspects of my program will be reflected in my academic grade and/or my ability to participate on the program.

15. Use of Photos, Quotes, and Other Materials. I authorize the use of materials pertaining to my faculty led program to be used for marketing purposes, including but not limited to my first name, photographs, quotes and other materials as deemed appropriate. Yes _____ No _____

In signing this document I acknowledge that I have had an opportunity to ask any questions I have about it, that I have read and understand it, that I accept its terms, and that I have signed it knowingly and voluntarily.

Signature: _____

Date: _____

RELEASE OF LIABILITY, PROMISE NOT TO SUE, ASSUMPTION OF RISK AND AGREEMENT TO PAY CLAIMS

Activity: _____

Activity Date(s) and Time(s): _____

Activity Location(s): _____

In consideration for being allowed to participate in this Activity, on behalf of myself and my next of kin, heirs and representatives, **I release from all liability and promise not to sue** the State of California, the Trustees of The California State University, California State University, [campus name] and their employees, officers, directors, volunteers and agents (collectively “University”) from any and all claims, **including claims of the University’s negligence**, resulting in any physical or psychological injury (including paralysis and death), illness, damages, or economic or emotional loss I may suffer because of my participation in this Activity, including travel to, from and during the Activity.

I am voluntarily participating in this Activity. I am aware of the risks associated with traveling to/from and participating in this Activity, which include but are not limited to physical or psychological injury, pain, suffering, illness, disfigurement, temporary or permanent disability (including paralysis), economic or emotional loss, and/or death. I understand that these injuries or outcomes may arise from my own or other’s actions, inaction, or negligence; conditions related to travel; or the condition of the Activity location(s). **Nonetheless, I assume all related risks, both known or unknown to me, of my participation in this Activity, including travel to, from and during the Activity.**

I agree to **hold** the University **harmless** from any and all claims, including attorney’s fees or damage to my personal property, that may occur as a result of my participation in this Activity, including travel to, from and during the Activity. If the University incurs any of these types of expenses, I agree to reimburse the University. If I need medical treatment, I agree to be financially responsible

for any costs incurred as a result of such treatment. I am aware and understand that I should carry my own health insurance.

I am 18 years or older. **I understand the legal consequences of signing this document, including (a) releasing the University from all liability, (b) promising not to sue the University, (c) and assuming all risks of participating in this Activity, including travel to, from and during the Activity.**

I understand that this document is written to be as broad and inclusive as legally permitted by the State of California. I agree that if any portion is held invalid or unenforceable, I will continue to be bound by the remaining terms.

I have read this document, and I am signing it freely. **No other representations concerning the legal effect of this document have been made to me.**

Participant Signature: _____

Participant Name (print): _____

Date: _____

If Participant is under 18 years of age:

I am the parent or legal guardian of the Participant. **I understand the legal consequences of signing this document, including (a) releasing the University from all liability on my and the Participant's behalf, (b) promising not to sue on my and the Participant's behalf, (c) and assuming all risks of the Participant's participation in this Activity, including travel to, from and during the Activity.** I allow Participant to participate in this Activity. I understand that I am responsible for the obligations and acts of Participant as described in this document. I agree to be bound by the terms of this document.

I have read this document, and I am signing it freely. **No other representations concerning the legal effect of this document have been made to me.** _____

Signature of Minor Participant's Parent/Guardian _____

Name of Minor Participant's Parent/Guardian (print) _____ Date _____

Minor Participant's Name _____

Appendix F - FLP Budget Form

SJSU Faculty Led International Program Budget Worksheet 2016

Program Name
Dates Abroad
Number of Days Abroad
Faculty Leader(s)

Minimum Enrollment 12
Credit Units 3
Tuition per credit \$250
Salary
[Faculty salary \(based on 2322 schedule\)](#)
OASDI (7.65% of the salary)
Total Faculty Salary and Benefits \$ -

Tuition & Administrative Fee	Per Student	Total
Tuition Fee	750.00	9,000.00
Administrative Fee / per student	200.00	2,400.00
Total Tuition & Administrative Fee		\$ 11,400.00

Program Fee *	Per Participant	Total
Student Expenses		
Lodging		-
Meals		-
Excursions		-
Health Insurance	50.00	600.00
<i>Subtotal, Student Expenses</i>	\$ 50.00	\$ 600.00
Other Student Expenses [please list]		
<<Add expense description>>		-
<<Add expense description>>		-
<<Add expense description>>		-
<<Add expense description>>		-
<i>Subtotal, Other Expenses</i>	\$ -	\$ -
Faculty Expenses		
Housing		-
Meals		-
Airfare		-
Health Insurance	75.00	75.00
Other Faculty Expenses [please list]		
<<Add expense description>>		-
<<Add expense description>>		-
<<Add expense description>>		-
<<Add expense description>>		-
<i>Subtotal, Faculty Expenses</i>	\$ 75.00	\$ 75.00

Prior Year Surplus {Optional}

Total Program Fee \$ 675.00

SJSU Tuition Fees	750.00
Program Administrative Fee	200.00
FLP Program Expense Fees	56.25
Total Program Cost / Student	1,006.25

**Note: Program Fee includes all lodging, meals, and other expenses that are billed by host institutions.*

Appendix G - FLP Application Acceptance Letter

Dear FLP Applicant,

Congratulations! You have been accepted to participate in the **YEAR COUNTRY** Faculty-Led Program led by **PROGRAM LEADER**.

Please read carefully the next steps you need to take to secure your spot in the program.

Step 1. Pre-Payment of \$500

Start date to make pre-payment: **DATE**

Deadline to make the pre-payment: **DATE**

Accepted students are required to make a pre-payment of \$500 to hold their spot in the program. The amount of \$500 will not automatically be charged to your MySJSU account. You will need to choose one of the three ways below to make your pre-payment. The system will apply your \$500 pre-payment to your program cost when you register for the course in your MySJSU. Course registration information will be sent to students in a separate email when the registration window opens.

There are three ways to make the pre-payment:

- Online through MySJSU. [See instruction \(PDF\)](#)
- In-person at the Bursar's Office by cash or check. Make sure to let the cashier know that you are making your deposit for a Faculty-Led Program (FLP).
- Send your check to the Bursar's Office. If paying by check, make the check payable to SJSU. In the memo section of your check, write "Faculty-Led Program, **PROGRAM CYCLE AND YEAR**, and your SJSU ID number".

*San José State University
Bursar's Office-Cashiering
One Washington Square SSC
San José, CA 95192-0138*

Outstanding Balance: If you have any outstanding balance on your account at the time you make the pre-payment, your pre-payment will automatically be routed by the system to cover the current outstanding balance and will not be routed to your Faculty-Led Program cost. In order to hold your spot in the FLP, there is a \$500 pre-payment.

Step 2. Signing the Commitment to Participate Form

First day to access the form: **DATE**

DATE Deadline to complete the form: **DATE**

On **DATE**, you will receive an email with instructions on how to access the form.

Course Registration and Payment: At the beginning of **MONTH**, you will receive an email with instruction on how to register for the course and to make the remaining payment for the program.

DACA Students: Please send an email to us at facultyledprograms@sjsu.edu or give us a call at 408-924-2684 or 408-924-2613 to set up an advising appointment. Please note all advising appointments remain confidential.

Please feel free to contact us at facultyledprograms@sjsu.edu if you have questions about the FLP process.

Best Regards,

Study Abroad and Away

Appendix H - FLP Application Open University Acceptance Letter

Dear FLP Applicant,

Congratulations! You have been accepted to participate in the **YEAR COUNTRY** Faculty-Led Program led by **PROGRAM LEADER**.

Please read carefully the next steps you need to take to secure your spot in the program.

Step 1. Pre-Payment of \$500

Start date to make pre-payment: **DATE**

Deadline to make the pre-payment: **DATE**

We are working on requesting an SJSU ID number for you so you can make the pre-payment. Once the SJSU ID number is issued, we will send you an email with payment instruction so you can make the pre-payment at that time.

Step 2. Signing the Commitment to Participate Form

First day to access the form: **DATE**

Deadline to complete the form: **DATE**

On **DATE**, you will receive an email with instructions on how to access the form.

Course Registration and Payment: At the beginning of February, you will receive an email with instruction on how to register for the course and to make the remaining payment for the program.

DACA Students: Please send an email to us at facultyledprograms@sjsu.edu or give us a call at 408-924-2684 or 408-924-2613 to set up an advising appointment. Please note all advising appointments remain confidential.

Please feel free to contact us at facultyledprograms@sjsu.edu if you have questions about the FLP process.

Best Regards,

Study Abroad and Away

Appendix I - FLP Application Rejection Letter

Dear FLP Applicant,

Thank you for your interest in participating in a Faculty-Led Program. Unfortunately, we are not able to offer you a spot in the **COUNTRY** program.

If you are interested in exploring other Faculty-Led Programs, there are still programs accepting applications for **PROGRAM CYCLE**. To see which programs still have available spaces, visit our [FLP program list](#).

Applications will be accepted starting **DATE** for Round 2. Instructions for submitting your application for Round 2 will be available on our [website](#) on **DATE**.

Please feel free to contact us if you have any questions.

Best Regards,

Study Abroad and Away

Appendix J - FLP Application Waitlist Letter

Dear FLP Applicant,

Thank you for your interest in the Faculty-Led Program to COUNTRY led by PROGRAM LEADER(S). Your application has been placed on the waitlist. You will be notified via email on **DATE** if you are selected to participate in the program.

If you are interested in exploring other Faculty-Led Programs, there are still programs accepting applications for **PROGRAM CYCLE**. To see which programs still have available spaces, visit our [FLP program list](#).

Best Regards,

Study Abroad and Away

Appendix K - Commitment to Participate Form Notification Letter

Dear Student,

Once we are able to see that you have made your \$500 pre-payment, we will update your application status to "Accepted" and you will receive an email from the system informing you of your status change. At that time:

1. Log back into your account: <https://goabroad.sjsu.edu/>
2. Click on the program link in the Applications box to access your application.
3. Click on the FLP Commitment to Participate Form link in the Materials Submission box.
4. Read the instruction for completing the form.
5. Click on the link to download the Commitment to Participate Form.
6. Fill out the required sections,
7. Print the form and sign.
8. Upload the completed and signed form into the Attached Document box.

Failure to submit this form by the due date will automatically revoke your spot on this FLP.

If you are having any problems accessing the form or if you have questions about the form, please feel free to email us at facultyledprograms@sjsu.edu.

Best Regards,

Study Abroad and Away

Appendix L - Independent Travel Hold-Harmless Statement



Faculty Led Study Abroad Program (FLP) Independent Travel and Hold-Harmless Statement

Instructions: Please enter information clearly. Digital signatures are accepted.

I, _____, will be participating in a CSU-affiliated study abroad program through San José State University in _____. I am aware that the official program dates are _____ to _____. I understand that I am required to arrive at the program site by the first day and participate in the entire program until the final departure date. If I arrive late or depart early from the official program dates, I understand that I could be dropped from the program and not receive credit or a refund of program fees. My participation in this program is voluntary.

I have been informed, and I understand that San José State University is in no way liable or responsible for me while I am traveling outside the official program dates. With this knowledge and information, I agree to participate in the program and I will travel independently at my own risk.

I release and hold harmless the State of California, the California State University system, San José State University (which is the campus affiliated with the program requiring the air travel) and each and every officer, employee and agent of each of them, from any and all claims and causes of action that I may have against any of these institutions or persons, by reason of any accident, illness, injury, death, or other consequences resulting directly or indirectly from or in any manner arising out of, or in connection with, my independent travel pursuant to my participation in the CSU-affiliated program. This release and hold-harmless shall also be binding on my heirs, assign, successors and all other persons who may claim through me.

The undersigned acknowledges that he/she has read the foregoing statement, understands the same, and affixes his/her signature at San José State University, the _____ day of _____, 20____.

Student's Signature: _____ Date: _____
Name: _____

If the above participant is under 18, the following agreement must be the signed by a parent or legal guardian.

As the parent or legal guardian of the minor: _____, a participant in the San José State University Study Abroad Program in _____ I hereby consent to the participation of said minor in the aforesaid SJSU Faculty Led Study Abroad Program, as described in this Consent and Release Agreement and affirm all covenants and agreements contained in the above instrument, including the release, discharge, save, hold harmless, and indemnification provisions therein.

Signature of Parent or Legal Guardian: _____ Date: _____

Name: _____

Permanent Street Address: _____

City: _____ State: _____ Zip Code: _____

Day Time Telephone Number: _____

Other/Message Number: _____

Appendix M - FLP Participant Medical Form

Faculty-Led Program (FLP) Student Health Form

The following medical information is important in the event of serious illness or accident while you are abroad with an SJSU Study Abroad and Away program. Please complete this form to the best of your knowledge by the specific deadlines in your acceptance email. Do NOT submit earlier than the deadlines below as we need the most updated health information prior to the start of the program.

It is important that the program personnel be made aware of any medical or emotional health conditions, past or current, which might affect you in a foreign study context. Mild physical or psychological conditions can become more serious when subjected to the stress of traveling and studying abroad.

The information you provide will remain confidential and will be shared with program staff, faculty, medical personnel or other appropriate professionals only if needed to protect your health and well-being while on the program. Copies will be on file with the Study Abroad and Away office and with the Program Leader, if applicable.

This information does not affect your acceptance into the program.

Questions:

1. Are you generally in good physical condition? If no, please explain.
2. Do you have or have you ever had a major illness, injury/accident, medical condition? These may include major illness, injury/accident, medical condition, or surgical operation (or been advised to have one). If yes, please explain.
3. Have you ever been hospitalized? If yes, please explain.
4. Do you have medical conditions that would require medical attention while on the program? If yes, please explain.
5. Do you have medications that you must continue taking while on the program?
6. Do you have any known allergies (to medications, plants, food, animals, insect stings, etc.)? If yes, please explain.
7. Have you ever been treated or are you currently being treated for any psychological or emotional problems? If yes, please explain.
8. Is there any additional information (concerning medical conditions or disabilities) that would be helpful for the program to be aware of during your education abroad experience? If yes, please explain.
9. If you have any disabilities that would be helpful for us to know, please select them below.

1st Emergency Contact Information

Please identify the person to be contacted in case of emergency.

Full Name (First Name and Last Name) _____

Relationship _____

Email Address _____

Phone Number (xxx-xxx-xxxx) _____

Alternate Phone Number (xxx-xxx-xxxx) _____

In case of a medical emergency, the emergency contact person may need to travel to the destination to assist the student in returning home, etc. Does the emergency contact person have a valid passport?

- Yes
- No
- Not sure

2nd Emergency Contact Information

Please identify the person to be contacted in case of emergency.

Full Name (First Name and Last Name) _____

Relationship _____

Email Address _____

Phone Number (xxx-xxx-xxxx) _____

Alternate Phone Number (xxx-xxx-xxxx) _____

In case of a medical emergency, the emergency contact person may need to travel to the destination to assist the student in returning home, etc. Does the emergency contact person have a valid passport?

- Yes
- No
- Not sure

Certification and Permission for Emergency Medical Treatment.

In the event of injury or illness to myself, I hereby authorize the official representative of SJSU's program to secure whatever medical treatment necessary, including anesthesia and surgery. I certify that all responses made on this Student Health Form are true and accurate, and I will notify

the Study Abroad and Away office (spartansabroad@sjus.edu) if any relevant changes in my health may occur prior to the start of the program. By typing my name below, I agree that the statements and information above are correct.

Signature _____

Full Name _____

Today's Date (mm/dd/yyyy) _____

Appendix N - Faculty Leader Medical Form

Faculty-Led Program (FLP) Program Leader Health Form

The following medical information is important in the event of serious illness or accident while you are abroad with the Faculty-Led Program. Please complete this form to the best of your knowledge.

The information you provide will remain confidential and will only be accessed and shared with program staff, medical personnel or other appropriate professionals in the event of a medical emergency to protect your health and well-being while on the program. The Study Abroad and Away office will delete this information upon the conclusion of the program.

Program Leader Name: _____

Program Location(s): _____

Program Dates: _____

Co-Leader or Volunteer Name (write N/A if not applicable):

Part I: Personal Medical Information

Please describe any health issues, allergies, medications, etc. you think we should have on record (things that you think medical personnel would need to know in an emergency). We will keep this information confidential.

Part II: Emergency Contact Information

Please identify the person to be contacted in case of emergency.

Full Name (First Name and Last Name): _____

Relationship to you: _____

Email address: _____

Phone number: _____

Alternate phone number: _____

Part III: Certification

I certify that all responses made on this Program Leader Health Form are true and accurate, and I will notify the Study Abroad and Away office if any relevant changes in my health may occur prior to the start of the program.

Signature: _____

Date _____

Appendix O - Travel Authorization Submission Guide

The logo for SJSU Global Education and Initiatives features the letters 'SJSU' in a large, bold, blue serif font. To its right is a vertical blue line, followed by the words 'GLOBAL EDUCATION' and 'AND INITIATIVES' in a smaller, blue, sans-serif font, stacked vertically.

Please complete and submit your travel authorization for your FLP in advance of travel. Without the travel authorization approved, the SAA will not be able to process any travel reimbursements.

It is important to note that a **travel authorization to non-high hazard countries must be approved at least 30 days before the departure date**. If it will be less than 30 days, you may be contacted by the university to provide an explanation for why the travel authorization was submitted less than 30 days.

Program Expenses: Faculty should not purchase tickets or make any program payments until all students have registered and made final program payments since attrition can occur at any point prior to final payment. If the program were to be cancelled for any reason, we will not make any reimbursements.

> *Before filling out your travel authorization...*

We recommend reviewing the **FTS guide for Travel Authorization** at:

http://www.sjsu.edu/finance/docs/tut_fts_travel_authorization.pdf

Transportation Expenses:

Please keep in mind reimbursement of transportation expenses will be based on the most economical method of transportation and the most commonly traveled route consistent with the authorized purpose of the trip per the [SJSU Travel Guide](#).

Using Fell Travel (travel agency approved by SJSU):

If you would like to use Fell Travel to assist you in booking your flight, it is a good idea to contact Fell Travel first to get a quote of the flight before filling out your travel authorization. If needed, you can also let Fell Travel know the estimated airfare budget you have so they can search for flights within the range of your estimated airfare budget.

> *When filling out your travel authorization...*

Estimated Expenses Section:

When entering your estimated expenses, enter the expenses that you are planning to request for reimbursement based on the approved FLP program budget.

Department ID:

For any fields that ask you to provide the Department ID (Dept ID) number (SAA will provide the SAA DeptID), so your travel authorization would be routed to CPGE and not to your department.

Funding/Source/Chartfields Section:

The SAA will provide the information you will need to input into the Funding/Source/Chartfields section of the Travel Authorization to ensure it gets routed to CPGE.

Account Number	XXXXXX
Fund Number	XXXXX
Dept ID	XXXX
Class Code (each FLP has a specific Class Code)	XXXX

> *To fill out your travel authorization...*

Visit <http://my.sjsu.edu/> and click on the FTS link.

> *Tracking Expenses and Reconciliation*

Program Leaders will need to document every expense so that the program’s account can be reconciled upon return. Please use the SAA created expense tracking spreadsheet and keep all receipts. Upon return, faculty will work directly with CPGE Finance to reconcile expenses in association with SJSU Procurement Services policies and guidelines. **FLP budget reconciliation and reimbursement must be completed within 45 days after the final day of the FLP program.**

Only expenses which have been budgeted for will be reimbursed and any budget deficit that is incurred must be covered by the program leader or his/her college.

Appendix P: W-8BEN Tax Form for Individuals

<p>Form W-8BEN (Rev. February 2014) Department of the Treasury Internal Revenue Service</p>	<p>Certificate of Foreign Status of Beneficial Owner for United States Tax Withholding and Reporting (Individuals)</p> <p>► For use by individuals. Entities must use Form W-8BEN-E. ► Information about Form W-8BEN and its separate instructions is at www.irs.gov/formw8ben. ► Give this form to the withholding agent or payer. Do not send to the IRS.</p>	<p>OMB No. 1545-1621</p>
<p>Do NOT use this form if:</p> <ul style="list-style-type: none"> • You are NOT an individual W-8BEN-E • You are a U.S. citizen or other U.S. person, including a resident alien individual W-9 • You are a beneficial owner claiming that income is effectively connected with the conduct of trade or business within the U.S. (other than personal services) W-8ECI • You are a beneficial owner who is receiving compensation for personal services performed in the United States 8233 or W-4 • A person acting as an intermediary W-8IMY 		
<p>Instead, use Form:</p>		
<p>Part I Identification of Beneficial Owner (see instructions)</p>		
<p>1 Name of individual who is the beneficial owner</p>	<p>2 Country of citizenship</p>	
<p>3 Permanent residence address (street, apt. or suite no., or rural route). Do not use a P.O. box or in-care-of address.</p> <p>City or town, state or province. Include postal code where appropriate. Country</p>		
<p>4 Mailing address (if different from above)</p> <p>City or town, state or province. Include postal code where appropriate. Country</p>		
<p>5 U.S. taxpayer identification number (SSN or ITIN), if required (see instructions)</p>	<p>6 Foreign tax identifying number (see instructions)</p>	
<p>7 Reference number(s) (see instructions)</p>	<p>8 Date of birth (MM-DD-YYYY) (see instructions)</p>	
<p>Part II Claim of Tax Treaty Benefits (for chapter 3 purposes only) (see instructions)</p>		
<p>9 I certify that the beneficial owner is a resident of _____ within the meaning of the income tax treaty between the United States and that country.</p>		
<p>10 Special rates and conditions (if applicable—see instructions): The beneficial owner is claiming the provisions of Article _____ of the treaty identified on line 9 above to claim a _____ % rate of withholding on (specify type of income): _____</p> <p>Explain the reasons the beneficial owner meets the terms of the treaty article: _____</p>		
<p>Part III Certification</p> <p>Under penalties of perjury, I declare that I have examined the information on this form and to the best of my knowledge and belief it is true, correct, and complete. I further certify under penalties of perjury that:</p> <ul style="list-style-type: none"> • I am the individual that is the beneficial owner (or am authorized to sign for the individual that is the beneficial owner) of all the income to which this form relates or am using this form to document myself as an individual that is an owner or account holder of a foreign financial institution, • The person named on line 1 of this form is not a U.S. person, • The income to which this form relates is: <ul style="list-style-type: none"> (a) not effectively connected with the conduct of a trade or business in the United States, (b) effectively connected but is not subject to tax under an applicable income tax treaty, or (c) the partner's share of a partnership's effectively connected income, • The person named on line 1 of this form is a resident of the treaty country listed on line 9 of the form (if any) within the meaning of the income tax treaty between the United States and that country, and • For broker transactions or barter exchanges, the beneficial owner is an exempt foreign person as defined in the instructions. <p>Furthermore, I authorize this form to be provided to any withholding agent that has control, receipt, or custody of the income of which I am the beneficial owner or any withholding agent that can disburse or make payments of the income of which I am the beneficial owner. I agree that I will submit a new form within 30 days if any certification made on this form becomes incorrect.</p>		
<p>Sign Here ►</p> <p>Signature of beneficial owner (or individual authorized to sign for beneficial owner) Date (MM-DD-YYYY)</p> <p>Print name of signer Capacity in which acting (if form is not signed by beneficial owner)</p>		
<p>For Paperwork Reduction Act Notice, see separate instructions. Cat. No. 25047Z Form W-8BEN (Rev. 2-2014)</p>		

Appendix Q: W-8BEN-E Tax Form for Entities

UPDATED INFORMATION FOR USERS OF FORM W-8BEN-E - - USE OF FORM W-8BEN (REVISION DATE FEBRUARY 2006) BEFORE JANUARY 1, 2015

The Form W-8BEN-E reflects changes made by the Foreign Account Tax Compliance Act (FATCA) and is for use by beneficial owners that are entities. Entities also may use the Form W-8BEN (revision date February 2006) through December 31, 2014.

For purposes of chapter 3 of the Internal Revenue Code, a Form W-8BEN (revision date February 2006) provided to a withholding agent by an entity before January 1, 2015 will remain valid until the form's validity expires under Treasury Regulations section 1.1441-1(e)(4)(ii).

For purposes of chapter 4 of the Internal Revenue Code, a Form W-8BEN (revision date February 2006) provided to a withholding agent by an entity before January 1, 2015 is and will remain valid to the extent permitted in Treasury Regulations section 1.1471-3(d)(1) (describing the allowance for use of a "pre-FATCA Form W-8"). See also Treasury Regulations section 1.1471-2T(a)(4)(ii) (describing a transitional exception to withholding for certain payments made with respect to a preexisting obligation).

A withholding agent may request that you provide a Form W-8BEN (revision date February 2006) before January 1, 2015. The Form W-8BEN (revision date February 2006) can be found on irs.gov in the Forms and Publications section, under the "Prior Year Forms" tab, by searching the cumulative list of forms posted there for the term "Form W-8". It does not reflect the changes made by FATCA.

Form **W-8BEN-E**

(February 2014)
Department of the Treasury
Internal Revenue Service

**Certificate of Status of Beneficial Owner for
United States Tax Withholding and Reporting (Entities)**

▶ For use by entities. Individuals must use Form W-8BEN. ▶ Section references are to the Internal Revenue Code.
▶ Information about Form W-8BEN-E and its separate instructions is at www.irs.gov/formw8bene.
▶ Give this form to the withholding agent or payer. Do not send to the IRS.

OMB No. 1545-1621

Do NOT use this form for:

- U.S. entity or U.S. citizen or resident **Instead use Form:** W-9
- A foreign individual W-8BEN (Individual)
- A foreign individual or entity claiming that income is effectively connected with the conduct of trade or business within the U.S. (unless claiming treaty benefits). W-8ECI
- A foreign partnership, a foreign simple trust, or a foreign grantor trust (unless claiming treaty benefits) (see instructions for exceptions) W-8IMY
- A foreign government, international organization, foreign central bank of issue, foreign tax-exempt organization, foreign private foundation, or government of a U.S. possession claiming that income is effectively connected U.S. income or that is claiming the applicability of section(s) 115(2), 501(c), 892, 895, or 1443(b) (unless claiming treaty benefits) (see instructions) W-8ECI or W-8EXP
- Any person acting as an intermediary W-8IMY

Part I Identification of Beneficial Owner

1 Name of organization that is the beneficial owner	2 Country of incorporation or organization
---	--

3 Name of disregarded entity receiving the payment (if applicable)

4 Chapter 3 Status (entity type) (Must check one box only):

<input type="checkbox"/> Corporation	<input type="checkbox"/> Disregarded entity	<input type="checkbox"/> Partnership
<input type="checkbox"/> Simple trust	<input type="checkbox"/> Grantor trust	<input type="checkbox"/> Complex trust
<input type="checkbox"/> Central Bank of Issue	<input type="checkbox"/> Tax-exempt organization	<input type="checkbox"/> Estate
<input type="checkbox"/> Private foundation	<input type="checkbox"/> Government	

If you entered disregarded entity, partnership, simple trust, or grantor trust above, is the entity a hybrid making a treaty claim? If "Yes" complete Part III. Yes No

5 Chapter 4 Status (FATCA status) (Must check one box only unless otherwise indicated). (See instructions for details and complete the certification below for the entity's applicable status).

- | | |
|---|---|
| <ul style="list-style-type: none"> <input type="checkbox"/> Nonparticipating FFI (including a limited FFI or an FFI related to a Reporting IGA FFI other than a registered deemed-compliant FFI or participating FFI). <input type="checkbox"/> Participating FFI. <input type="checkbox"/> Reporting Model 1 FFI. <input type="checkbox"/> Reporting Model 2 FFI. <input type="checkbox"/> Registered deemed-compliant FFI (other than a reporting Model 1 FFI or sponsored FFI that has not obtained a GIIN). <input type="checkbox"/> Sponsored FFI that has not obtained a GIIN. Complete Part IV. <input type="checkbox"/> Certified deemed-compliant nonregistering local bank. Complete Part V. <input type="checkbox"/> Certified deemed-compliant FFI with only low-value accounts. Complete Part VI. <input type="checkbox"/> Certified deemed-compliant sponsored, closely held investment vehicle. Complete Part VII. <input type="checkbox"/> Certified deemed-compliant limited life debt investment entity. Complete Part VIII. <input type="checkbox"/> Certified deemed-compliant investment advisors and investment managers. Complete Part IX. <input type="checkbox"/> Owner-documented FFI. Complete Part X. <input type="checkbox"/> Restricted distributor. Complete Part XI. | <ul style="list-style-type: none"> <input type="checkbox"/> Nonreporting IGA FFI (including an FFI treated as a registered deemed-compliant FFI under an applicable Model 2 IGA). Complete Part XII. <input type="checkbox"/> Foreign government, government of a U.S. possession, or foreign central bank of issue. Complete Part XIV. <input type="checkbox"/> International organization. Complete Part XV. <input type="checkbox"/> Exempt retirement plans. Complete Part XV. <input type="checkbox"/> Entity wholly owned by exempt beneficial owners. Complete Part XVI. <input type="checkbox"/> Territory financial institution. Complete Part XVII. <input type="checkbox"/> Nonfinancial group entity. Complete Part XVIII. <input type="checkbox"/> Excepted nonfinancial start-up company. Complete Part XIX. <input type="checkbox"/> Excepted nonfinancial entity in liquidation or bankruptcy. Complete Part XX. <input type="checkbox"/> 501(c) organization. Complete Part XXI. <input type="checkbox"/> Nonprofit organization. Complete Part XXII. <input type="checkbox"/> Publicly traded NFFE or NFFE affiliate of a publicly traded corporation. Complete Part XXIII. <input type="checkbox"/> Excepted territory NFFE. Complete Part XXIV. <input type="checkbox"/> Active NFFE. Complete Part XXV. <input type="checkbox"/> Passive NFFE. Complete Part XXVI. <input type="checkbox"/> Excepted inter-affiliate FFI. Complete Part XXVII. <input type="checkbox"/> Direct reporting NFFE. <input type="checkbox"/> Sponsored direct reporting NFFE. Complete Part XXVIII. |
|---|---|

6 Permanent residence address (street, apt. or suite no., or rural route). Do not use a P.O. box or in-care-of address (other than a registered address).

City or town, state or province. Include postal code where appropriate.	Country
---	---------

7 Mailing address (if different from above)

City or town, state or province. Include postal code where appropriate.	Country
---	---------

8 U.S. taxpayer identification number (TIN), if required	9a <input type="checkbox"/> GIIN	b <input type="checkbox"/> Foreign TIN	10 Reference number(s) (see instructions)
--	----------------------------------	--	---

Note. Please complete remainder of the form including signing the form in Part XXIX.
For Paperwork Reduction Act Notice, see separate instructions. Cat. No. 59689N **Form W-8BEN-E** (2-2014)

Part II Disregarded Entity or Branch Receiving Payment. (Complete only if disregarded entity or branch of an FFI in a country other than the FFI's country of residence.)

11 Chapter 4 Status (FATCA status) of disregarded entity or branch receiving payment

Limited Branch. Reporting Model 1 FFI. U.S. Branch.
 Participating FFI. Reporting Model 2 FFI.

12 Address of disregarded entity or branch (street, apt. or suite no., or rural route). **Do not use a P.O. box or in-care-of address** (other than a registered address).

City or town, state or province. Include postal code where appropriate.

Country

13 GIIN (if any)

Part III Claim of Tax Treaty Benefits (if applicable). (For chapter 3 purposes only)

14 I certify that (check all that apply):

a The beneficial owner is a resident of _____ within the meaning of the income tax treaty between the United States and that country.

b The beneficial owner derives the item (or items) of income for which the treaty benefits are claimed, and, if applicable, meets the requirements of the treaty provision dealing with limitation on benefits (see instructions).

c The beneficial owner is claiming treaty benefits for dividends received from a foreign corporation or interest from a U.S. trade or business of a foreign corporation and meets qualified resident status (see instructions).

15 **Special rates and conditions** (if applicable—see instructions): The beneficial owner is claiming the provisions of Article _____ of the treaty identified on line 14a above to claim a _____ % rate of withholding on (specify type of income): _____
 Explain the reasons the beneficial owner meets the terms of the treaty article: _____

Part IV Sponsored FFI That Has Not Obtained a GIIN

16 Name of sponsoring entity: _____

17 **Check whichever box applies.**

I certify that the entity identified in Part I:

- Is an FFI solely because it is an investment entity;
- Is not a QI, WP, or WT; **and**
- Has agreed with the entity identified above (that is not a nonparticipating FFI) to act as the sponsoring entity for this entity.

I certify that the entity identified in Part I:

- Is a controlled foreign corporation as defined in section 957(a);
- Is not a QI, WP, or WT;
- Is wholly owned, directly or indirectly, by the U.S. financial institution identified above that agrees to act as the sponsoring entity for this entity; **and**
- Shares a common electronic account system with the sponsoring entity (identified above) that enables the sponsoring entity to identify all account holders and payees of the entity and to access all account and customer information maintained by the entity including, but not limited to, customer identification information, customer documentation, account balance, and all payments made to account holders or payees.

Part V Certified Deemed-Compliant Nonregistering Local Bank

18 I certify that the FFI identified in Part I:

- Operates and is licensed solely as a bank or credit union (or similar cooperative credit organization operated without profit) in its country of incorporation or organization;
- Engages primarily in the business of receiving deposits from and making loans to, with respect to a bank, retail customers unrelated to such bank and, with respect to a credit union or similar cooperative credit organization, members, provided that no member has a greater than five percent interest in such credit union or cooperative credit organization;
- Does not solicit account holders outside its country of organization;
- Has no fixed place of business outside such country (for this purpose, a fixed place of business does not include a location that is not advertised to the public and from which the FFI performs solely administrative support functions);
- Has no more than \$175 million in assets on its balance sheet and, if it is a member of an expanded affiliated group, the group has no more than \$500 million in total assets on its consolidated or combined balance sheets; **and**
- Does not have any member of its expanded affiliated group that is a foreign financial institution, other than a foreign financial institution that is incorporated or organized in the same country as the FFI identified in Part I and that meets the requirements set forth in this Part V.

Part VI Certified Deemed-Compliant FFI with Only Low-Value Accounts

- 19 I certify that the FFI identified in Part I:
- Is not engaged primarily in the business of investing, reinvesting, or trading in securities, partnership interests, commodities, notional principal contracts, insurance or annuity contracts, or any interest (including a futures or forward contract or option) in such security, partnership interest, commodity, notional principal contract, insurance contract or annuity contract;
 - No financial account maintained by the FFI or any member of its expanded affiliated group, if any, has a balance or value in excess of \$50,000 (as determined after applying applicable account aggregation rules); **and**
 - Neither the FFI nor the entire expanded affiliated group, if any, of the FFI, have more than \$50 million in assets on its consolidated or combined balance sheet as of the end of its most recent accounting year.

Part VII Certified Deemed-Compliant Sponsored, Closely Held Investment Vehicle

- 20 Name of sponsoring entity: _____
- 21 I certify that the entity identified in Part I:
- Is an FFI solely because it is an investment entity described in §1.1471-5(e)(4);
 - Is not a QL, WP, or WT;
 - Has a contractual relationship with the above identified sponsoring entity that agrees to fulfill all due diligence, withholding, and reporting responsibilities of a participating FFI on behalf of this entity; **and**
 - Twenty or fewer individuals own all of the debt and equity interests in the entity (disregarding debt interests owned by U.S. financial institutions, participating FFIs, registered deemed-compliant FFIs, and certified deemed-compliant FFIs and equity interests owned by an entity if that entity owns 100 percent of the equity interests in the FFI and is itself a sponsored FFI).

Part VIII Certified Deemed-Compliant Limited Life Debt Investment Entity

- 22 I certify that the entity identified in Part I:
- Was in existence as of January 17, 2013;
 - Issued all classes of its debt or equity interests to investors on or before January 17, 2013, pursuant to a trust indenture or similar agreement; **and**
 - Is certified deemed-compliant because it satisfies the requirements to be treated as a limited life debt investment entity (such as the restrictions with respect to its assets and other requirements under § 1.1471-5(f)(2)(iv)).

Part IX Certified Deemed-Compliant Investment Advisors and Investment Managers

- 23 I certify that the entity identified in Part I:
- Is a financial institution solely because it is an investment entity described in § 1.1471-5(e)(4)(i)(A); **and**
 - Does not maintain financial accounts.

Part X Owner-Documented FFI

Note. This status only applies if the U.S. financial institution or participating FFI to which this form is given has agreed that it will treat the FFI as an owner-documented FFI (see instructions for eligibility requirements). In addition, the FFI must make the certifications below.

- 24a (All owner-documented FFIs check here) I certify that the FFI identified in Part I:
- Does not act as an intermediary;
 - Does not accept deposits in the ordinary course of a banking or similar business;
 - Does not hold, as a substantial portion of its business, financial assets for the account of others;
 - Is not an insurance company (or the holding company of an insurance company) that issues or is obligated to make payments with respect to a financial account;
 - Is not owned by or in an expanded affiliated group with an entity that accepts deposits in the ordinary course of a banking or similar business, holds, as a substantial portion of its business, financial assets for the account of others, or is an insurance company (or the holding company of an insurance company) that issues or is obligated to make payments with respect to a financial account; **and**
 - Does not maintain a financial account for any nonparticipating FFI.

Part X Owner-Documented FFI (continued)**Check box 24b or 24c, whichever applies.**

- b** I certify that the FFI identified in Part I:
- Has provided, or will provide, an FFI owner reporting statement that contains:
 - The name, address, TIN (if any), chapter 4 status, and type of documentation provided (if required) of every individual and specified U.S. person that owns a direct or indirect equity interest in the owner-documented FFI (looking through all entities other than specified U.S. persons);
 - The name, address, TIN (if any), chapter 4 status, and type of documentation provided (if required) of every individual and specified U.S. person that owns a debt interest in the owner-documented FFI (including any indirect debt interest, which includes debt interests in any entity that directly or indirectly owns the payee or any direct or indirect equity interest in a debt holder of the payee) that constitutes a financial account in excess of \$50,000 (disregarding all such debt interests owned by participating FFIs, registered deemed-compliant FFIs, certified deemed-compliant FFIs, excepted NFFEs, exempt beneficial owners, or U.S. persons other than specified U.S. persons); **and**
 - Any additional information the withholding agent requests in order to fulfill its obligations with respect to the entity.
- c** I certify that the FFI identified in Part I has provided, or will provide, an auditor's letter, signed within four years of the date of payment, from an independent accounting firm or legal representative with a location in the United States stating that the firm or representative has reviewed the FFI's documentation with respect to all of its owners and debt holders identified in §1.1471-3(d)(6)(iv)(A)(2), and that the FFI meets all the requirements to be an owner-documented FFI. The FFI identified in Part I has also provided, or will provide, an FFI owner reporting statement of its owners that are specified U.S. persons and Form(s) W-9, with applicable waivers.

Check box 24d if applicable.

- d** I certify that the entity identified in line 1 is a trust that does not have any contingent beneficiaries or designated classes with unidentified beneficiaries.

Part XI Restricted Distributor

- 25a** (All restricted distributors check here) I certify that the entity identified in Part I:
- Operates as a distributor with respect to debt or equity interests of the restricted fund with respect to which this form is furnished;
 - Provides investment services to at least 30 customers unrelated to each other and less than half of its customers are related to each other;
 - Is required to perform AML due diligence procedures under the anti-money laundering laws of its country of organization (which is an FATF-compliant jurisdiction);
 - Operates solely in its country of incorporation or organization, has no fixed place of business outside of that country, and has the same country of incorporation or organization as all members of its affiliated group, if any;
 - Does not solicit customers outside its country of incorporation or organization;
 - Has no more than \$175 million in total assets under management and no more than \$7 million in gross revenue on its income statement for the most recent accounting year;
 - Is not a member of an expanded affiliated group that has more than \$500 million in total assets under management or more than \$20 million in gross revenue for its most recent accounting year on a combined or consolidated income statement; **and**
 - Does not distribute any debt or securities of the restricted fund to specified U.S. persons, passive NFFEs with one or more substantial U.S. owners, or nonparticipating FFIs.

Check box 25b or 25c, whichever applies.

I further certify that with respect to all sales of debt or equity interests in the restricted fund with respect to which this form is furnished that are made after December 31, 2011, the entity identified in Part I:

- b** Has been bound by a distribution agreement that contained a general prohibition on the sale of debt or securities to U.S. entities and U.S. resident individuals and is currently bound by a distribution agreement that contains a prohibition of the sale of debt or securities to any specified U.S. person, passive NFFE with one or more substantial U.S. owners, or nonparticipating FFI.
- c** Is currently bound by a distribution agreement that contains a prohibition on the sale of debt or securities to any specified U.S. person, passive NFFE with one or more substantial U.S. owners, or nonparticipating FFI and, for all sales made prior to the time that such a restriction was included in its distribution agreement, has reviewed all accounts related to such sales in accordance with the procedures identified in §1.1471-4(c) applicable to preexisting accounts and has redeemed or retired any, or caused the restricted fund to transfer the securities to a distributor that is a participating FFI or reporting Model 1 FFI securities which were sold to specified U.S. persons, passive NFFEs with one or more substantial U.S. owners, or nonparticipating FFIs.

Part XII Nonreporting IGA FFI

- 26** I certify that the entity identified in Part I:
- Meets the requirements to be considered a nonreporting financial institution pursuant to an applicable IGA between the United States and _____;
 - Is treated as a _____ under the provisions of the applicable IGA (see instructions); **and**
 - If you are an FFI treated as a registered deemed-compliant FFI under an applicable Model 2 IGA, provide your GIIN: _____

Part XIII Foreign Government, Government of a U.S. Possession, or Foreign Central Bank of Issue

- 27 I certify that the entity identified in Part I is the beneficial owner of the payment and is not engaged in commercial financial activities of a type engaged in by an insurance company, custodial institution, or depository institution with respect to the payments, accounts, or obligations for which this form is submitted (except as permitted in §1.1471-6(h)(2)).

Part XIV International Organization

Check box 28a or 28b, whichever applies.

- 28a I certify that the entity identified in Part I is an international organization described in section 7701(a)(18).
- b I certify that the entity identified in Part I:
- Is comprised primarily of foreign governments;
 - Is recognized as an intergovernmental or supranational organization under a foreign law similar to the International Organizations Immunities Act;
 - The benefit of the entity's income does not inure to any private person;
 - Is the beneficial owner of the payment and is not engaged in commercial financial activities of a type engaged in by an insurance company, custodial institution, or depository institution with respect to the payments, accounts, or obligations for which this form is submitted (except as permitted in §1.1471-6(h)(2)).

Part XV Exempt Retirement Plans

Check box 29a, b, c, d, e, or f, whichever applies.

- 29a I certify that the entity identified in Part I:
- Is established in a country with which the United States has an income tax treaty in force (see Part III if claiming treaty benefits);
 - Is operated principally to administer or provide pension or retirement benefits; **and**
 - Is entitled to treaty benefits on income that the fund derives from U.S. sources (or would be entitled to benefits if it derived any such income) as a resident of the other country which satisfies any applicable limitation on benefits requirement.
- b I certify that the entity identified in Part I:
- Is organized for the provision of retirement, disability, or death benefits (or any combination thereof) to beneficiaries that are former employees of one or more employers in consideration for services rendered;
 - No single beneficiary has a right to more than 5% of the FFI's assets;
 - Is subject to government regulation and provides annual information reporting about its beneficiaries to the relevant tax authorities in the country in which the fund is established or operated; **and**
 - Is generally exempt from tax on investment income under the laws of the country in which it is established or operates due to its status as a retirement or pension plan;
 - Receives at least 50% of its total contributions from sponsoring employers (disregarding transfers of assets from other plans described in this part, retirement and pension accounts described in an applicable Model 1 or Model 2 IGA, other retirement funds described in an applicable Model 1 or Model 2 IGA, or accounts described in §1.1471-5(b)(2)(i)(A));
 - Either does not permit or penalizes distributions or withdrawals made before the occurrence of specified events related to retirement, disability, or death (except rollover distributions to accounts described in §1.1471-5(b)(2)(i)(A) (referring to retirement and pension accounts), to retirement and pension accounts described in an applicable Model 1 or Model 2 IGA, or to other retirement funds described in this part or in an applicable Model 1 or Model 2 IGA); **or**
 - Limits contributions by employees to the fund by reference to earned income of the employee or may not exceed \$50,000 annually.
- c I certify that the entity identified in Part I:
- Is organized for the provision of retirement, disability, or death benefits (or any combination thereof) to beneficiaries that are former employees of one or more employers in consideration for services rendered;
 - Has fewer than 50 participants;
 - Is sponsored by one or more employers each of which is not an investment entity or passive NFFE;
 - Employee and employer contributions to the fund (disregarding transfers of assets from other plans described in this part, retirement and pension accounts described in an applicable Model 1 or Model 2 IGA, or accounts described in §1.1471-5(b)(2)(i)(A)) are limited by reference to earned income and compensation of the employee, respectively;
 - Participants that are not residents of the country in which the fund is established or operated are not entitled to more than 20 percent of the fund's assets; **and**
 - Is subject to government regulation and provides annual information reporting about its beneficiaries to the relevant tax authorities in the country in which the fund is established or operates.
- d I certify that the entity identified in Part I is formed pursuant to a pension plan that would meet the requirements of section 401(a), other than the requirement that the plan be funded by a trust created or organized in the United States.
- e I certify that the entity identified in Part I is established exclusively to earn income for the benefit of one or more retirement funds described in this part or in an applicable Model 1 or Model 2 IGA, accounts described in §1.1471-5(b)(2)(i)(A) (referring to retirement and pension accounts), or retirement and pension accounts described in an applicable Model 1 or Model 2 IGA.

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Part XV Exempt Retirement Plans (Continued)f I certify that the entity identified in Part I:

- Is established and sponsored by a foreign government, international organization, central bank of issue, or government of a U.S. possession (each as defined in §1.1471-6) or an exempt beneficial owner described in an applicable Model 1 or Model 2 IGA to provide retirement, disability, or death benefits to beneficiaries or participants that are current or former employees of the sponsor (or persons designated by such employees); or
- Is established and sponsored by a foreign government, international organization, central bank of issue, or government of a U.S. possession (each as defined in §1.1471-6) or an exempt beneficial owner described in an applicable Model 1 or Model 2 IGA to provide retirement, disability, or death benefits to beneficiaries or participants that are not current or former employees of such sponsor, but are in consideration of personal services performed for the sponsor.

Part XVI Entity Wholly Owned by Exempt Beneficial Owners30 I certify that the entity identified in Part I:

- Is an FFI solely because it is an investment entity;
- Each direct holder of an equity interest in the investment entity is an exempt beneficial owner described in §1.1471-6 or in an applicable Model 1 or Model 2 IGA;
- Each direct holder of a debt interest in the investment entity is either a depository institution (with respect to a loan made to such entity) or an exempt beneficial owner described in §1.1471-6 or an applicable Model 1 or Model 2 IGA.
- Has provided an owner reporting statement that contains the name, address, TIN (if any), chapter 4 status, and a description of the type of documentation provided to the withholding agent for every person that owns a debt interest constituting a financial account or direct equity interest in the entity; and
- Has provided documentation establishing that every owner of the entity is an entity described in §1.1471-6(b), (c), (d), (e), (f) and/or (g) without regard to whether such owners are beneficial owners.

Part XVII Territory Financial Institution31 I certify that the entity identified in Part I is a financial institution (other than an investment entity) that is incorporated or organized under the laws of a possession of the United States.**Part XVIII Excepted Nonfinancial Group Entity**32 I certify that the entity identified in Part I:

- Is a holding company, treasury center, or captive finance company and substantially all of the entity's activities are functions described in §1.1471-5(e)(5)(i)(C) through (E);
- Is a member of a nonfinancial group described in §1.1471-5(e)(5)(i)(B);
- Is not a depository or custodial institution (other than for members of the entity's expanded affiliated group); and
- Does not function (or hold itself out) as an investment fund, such as a private equity fund, venture capital fund, leveraged buyout fund, or any investment vehicle with an investment strategy to acquire or fund companies and then hold interests in those companies as capital assets for investment purposes.

Part XIX Excepted Nonfinancial Start-Up Company33 I certify that the entity identified in Part I:

- Was formed on (or, in the case of a new line of business, the date of board resolution approving the new line of business) _____ (date must be less than 24 months prior to date of payment);
- Is not yet operating a business and has no prior operating history or is investing capital in assets with the intent to operate a new line of business other than that of a financial institution or passive NFFE;
- Is investing capital into assets with the intent to operate a business other than that of a financial institution; and
- Does not function (or hold itself out) as an investment fund, such as a private equity fund, venture capital fund, leveraged buyout fund, or any investment vehicle whose purpose is to acquire or fund companies and then hold interests in those companies as capital assets for investment purposes.

Part XX Excepted Nonfinancial Entity in Liquidation or Bankruptcy34 I certify that the entity identified in Part I:

- Filed a plan of liquidation, filed a plan of reorganization, or filed for bankruptcy on _____;
- During the past 5 years has not been engaged in business as a financial institution or acted as a passive NFFE;
- Is either liquidating or emerging from a reorganization or bankruptcy with the intent to continue or recommence operations as a nonfinancial entity; and
- Has, or will provide, documentary evidence such as a bankruptcy filing or other public documentation that supports its claim if it remains in bankruptcy or liquidation for more than three years.

Part XXI 501(c) Organization35 I certify that the entity identified in Part I is a 501(c) organization that:

- Has been issued a determination letter from the IRS that is currently in effect concluding that the payee is a section 501(c) organization that is dated _____; or
- Has provided a copy of an opinion from U.S. counsel certifying that the payee is a section 501(c) organization (without regard to whether the payee is a foreign private foundation).

Part XXII Non-Profit Organization

- 36 I certify that the entity identified in Part I is a non-profit organization that meets the following requirements:
- The entity is established and maintained in its country of residence exclusively for religious, charitable, scientific, artistic, cultural or educational purposes;
 - The entity is exempt from income tax in its country of residence;
 - The entity has no shareholders or members who have a proprietary or beneficial interest in its income or assets;
 - Neither the applicable laws of the entity's country of residence nor the entity's formation documents permit any income or assets of the entity to be distributed to, or applied for the benefit of, a private person or non-charitable entity other than pursuant to the conduct of the entity's charitable activities or as payment of reasonable compensation for services rendered or payment representing the fair market value of property which the entity has purchased; and
 - The applicable laws of the entity's country of residence or the entity's formation documents require that, upon the entity's liquidation or dissolution, all of its assets be distributed to an entity that is a foreign government, an integral part of a foreign government, a controlled entity of a foreign government, or another organization that is described in this Part XXII or escheats to the government of the entity's country of residence or any political subdivision thereof.

Part XXIII Publicly Traded NFFE or NFFE Affiliate of a Publicly Traded Corporation

Check box 37a or 37b, whichever applies.

- 37a I certify that:
- The entity identified in Part I is a foreign corporation that is not a financial institution; and
 - The stock of such corporation is regularly traded on one or more established securities markets, including _____ (name one securities exchange upon which the stock is regularly traded).
- b I certify that:
- The entity identified in Part I is a foreign corporation that is not a financial institution;
 - The entity identified in Part I is a member of the same expanded affiliated group as an entity the stock of which is regularly traded on an established securities market;
 - The name of the entity, the stock of which is regularly traded on an established securities market, is _____; and
 - The name of the securities market on which the stock is regularly traded is _____.

Part XXIV Excepted Territory NFFE

- 38 I certify that:
- The entity identified in Part I is an entity that is organized in a possession of the United States;
 - The entity identified in Part I:
 - Does not accept deposits in the ordinary course of a banking or similar business,
 - Does not hold, as a substantial portion of its business, financial assets for the account of others, or
 - Is not an insurance company (or the holding company of an insurance company) that issues or is obligated to make payments with respect to a financial account; and
 - All of the owners of the entity identified in Part I are bona fide residents of the possession in which the NFFE is organized or incorporated.

Part XXV Active NFFE

- 39 I certify that:
- The entity identified in Part I is a foreign entity that is not a financial institution;
 - Less than 50% of such entity's gross income for the preceding calendar year is passive income; and
 - Less than 50% of the assets held by such entity are assets that produce or are held for the production of passive income (calculated as a weighted average of the percentage of passive assets measured quarterly) (see instructions for the definition of passive income).

Part XXVI Passive NFFE

- 40a I certify that the entity identified in Part I is a foreign entity that is not a financial institution (other than an investment entity organized in a possession of the United States) and is not certifying its status as a publicly traded NFFE (or affiliate), excepted territory NFFE, active NFFE, direct reporting NFFE, or sponsored direct reporting NFFE.

Check box 40b or 40c, whichever applies.

- b I further certify that the entity identified in Part I has no substantial U.S. owners, or
- c I further certify that the entity identified in Part I has provided the name, address, and TIN of each substantial U.S. owner of the NFFE in Part XXX.

Part XXVII Excepted Inter-Affiliate FFI

- 41 I certify that the entity identified in Part I:
- Is a member of an expanded affiliated group;
 - Does not maintain financial accounts (other than accounts maintained for members of its expanded affiliated group);
 - Does not make withholdable payments to any person other than to members of its expanded affiliated group that are not limited FFIs or limited branches;
 - Does not hold an account (other than a depository account in the country in which the entity is operating to pay for expenses) with or receive payments from any withholding agent other than a member of its expanded affiliated group; and
 - Has not agreed to report under §1.1471-4(d)(2)(i)(C) or otherwise act as an agent for chapter 4 purposes on behalf of any financial institution, including a member of its expanded affiliated group.

Part XXVIII **Sponsored Direct Reporting NFFE**

42 Name of sponsoring entity: _____

43 I certify that the entity identified in Part I is a direct reporting NFFE that is sponsored by the entity identified in line 42.

Part XXIX **Certification**

Under penalties of perjury, I declare that I have examined the information on this form and to the best of my knowledge and belief it is true, correct, and complete. I further certify under penalties of perjury that:

- The entity identified on line 1 of this form is the beneficial owner of all the income to which this form relates, is using this form to certify its status for chapter 4 purposes, or is a merchant submitting this form for purposes of section 6050W,
- The entity identified on line 1 of this form is not a U.S. person,
- The income to which this form relates is: (a) not effectively connected with the conduct of a trade or business in the United States, (b) effectively connected but is not subject to tax under an income tax treaty, or (c) the partner's share of a partnership's effectively connected income, and
- For broker transactions or barter exchanges, the beneficial owner is an exempt foreign person as defined in the instructions.

Furthermore, I authorize this form to be provided to any withholding agent that has control, receipt, or custody of the income of which the entity on line 1 is the beneficial owner or any withholding agent that can disburse or make payments of the income of which the entity on line 1 is the beneficial owner.

I agree that I will submit a new form within 30 days if any certification on this form becomes incorrect.

Sign Here ▶

Signature of individual authorized to sign for beneficial owner	Print Name	Date (MM-DD-YYYY)

I certify that I have the capacity to sign for the entity identified on line 1 of this form.

Part XXX **Substantial U.S. Owners of Passive NFFE**

As required by Part XXVI, provide the name, address, and TIN of each substantial U.S. owner of the NFFE. Please see instructions for definition of substantial U.S. owner.

Name	Address	TIN

Appendix R - Expense Tracking Spreadsheet

	A	B	E	F	H	I	J
1	Currency Name	Code	Rate vs. USD				
2	Euro	EUR	1.064337102				
3	U.K. Pound Sterling	GBP	1.244821682				
4	Australian Dollar	AUD	0.753044659				
5	Swiss Franc	CHF	0.994975186				
6	Japanese Yen	JPY	0.009043992				
7	Canadian Dollar	CAD	0.746769979				
8	Hong Kong Dollar	HKD	0.128697318				
9	Central African CFA Franc	XAF	0.001622673				
10	Vietnamese Dong	VND	4.41071E-05				
11	Argentine Peso	ARS	0.064918607				
12	Chinese Yuan	CNY	0.144956397				
13	East Caribbean Dollar	XCD	0.371535394				
14	Guatemalan Quetzal	GTQ	0.130203875				
15	Moroccan Dirham	MAD	0.099348165				
16	Brunei Dollar	BND	0.71347032				
17	Panamanian Balboa	PAB	0.99932958				
18	Azerbaijan Manat	AZN	0.593472254				
19	Colombian Peso	COP	0.000350049				
20	Kyrgyzstan Som	KGS	0.014608987				
21	Hungarian Forint	HUF	0.003433458				
22	Tajikistan Ruble	TJS	0.118553727				
23	Indonesian Rupiah	IDR	7.50498E-05				
24	Egyptian Pound	EGP	0.055416699				
25	South Korean Won	KRW	0.000882761				
26	Paraguayan Guaraní	PYG	0.000177843				
27	Malaysian Ringgit	MYR	0.225336204				
28	Costa Rican Colón	CRC	0.001777225				
29	New Zealand Dollar	NZD	0.697416558				
30	Pakistani Rupee	PKR	0.009537878				
31	Russian Rouble	RUB	0.017695516				
32	South African Rand	ZAR	0.072487099				
33	Tunisian Dinar	TND	0.43017939				
34	Barbadian Dollar	BBD	0.5				
35	Bulgarian Lev	BGN	0.544538465				
36	Turkish Lira	TRY	0.269319218				
37	Philippine Peso	PHP	0.019920004				
38	New Taiwan Dollar	TWD	0.032673519				
39	Nigerian Naira	NGN	0.003271181				

Instructions for copying exchange rate to other pages

- Place cursor over the rate of exchange for the currency you need.
- Press Ctrl+C to copy the identified rate
- Go to the tab of the page you need to populate the appropriate worksheet, e.g. "One-time Expenses".
- Find the "Exchange Rate" Column, and press Ctrl+V to paste the rate into the appropriate cell.
- After you press Ctrl+V, you will see in the "Exchange Rate" column and the "Total (USD)" column that two cells pop up a message that says #VALUE!
- Look at the "Total USD" cell that should say, #VALUE!, click on that cell so it is highlighted. Right below, you will see a clipboard icon and (ctrl) with a small arrow pointing downward. Click on the arrow to expand your menu options.
- Look for "Paste Values" in the drop down menu and select the clipboard with 123 listed on it. This should populate the exchange rate and trigger the formula to make the conversion.
- You can then place your cursor over the exchange rate that has populate, click that cell and click Ctrl+C to copy the rate. Once the rate has been copied, you can paste (Ctrl+V) that rate in the "Exchange Rate" column so that the rate appears for each line item.

	A	B	C	D	E	F	G	H	I
1	One-time transactions - Please record all your one-time transactions (lodging, airfare, etc.) HERE ONLY.								
2									
3	Program name						Local currency		
4	Account #	11-00-							
5						y/n			
6	Country	Date	Amount (local)	Exchange Rate	Total (USD)	Receipt	Description	Receipt #	PD Initials
7					\$0.00				
8					\$0.00				
9					\$0.00				
10					\$0.00				
11					\$0.00				
12					\$0.00				
13					\$0.00				
14					\$0.00				
15					\$0.00				
16					\$0.00				
17					\$0.00				
18					\$0.00				
19					\$0.00				
20					\$0.00				
21					\$0.00				
22					\$0.00				
23					\$0.00				
24					\$0.00				
25					\$0.00				
26					\$0.00				
27					\$0.00				
28					\$0.00				
29					\$0.00				
30					\$0.00				
31					\$0.00				
32					\$0.00				
33					\$0.00				
34					\$0.00				
35					\$0.00				
36					\$0.00				
37					\$0.00				
38					\$0.00				
39					\$0.00				
40					\$0.00				
41					\$0.00				
42					\$0.00				
43					\$0.00				
44					\$0.00				
45					\$0.00				
46					\$0.00				
47									
48									
49	Total Cash Withdrawals vs. Total Cash Tr			0.00					

	A	B	C	D	E	F	G	H	I	J	K
1	Daily charges - Please record your daily charges HERE ONLY.										
2											
3											
4	Program name										
5											
6											
7	Account #	11-00-									
8						y/n					
9	Country	Date	Amount (local)	Exchange rate	Total (USD)	Receipt	Category	Description	Receipt #	PD Initials	
10					\$0.00						
11					\$0.00						
12					\$0.00						
13					\$0.00						
14					\$0.00						
15					\$0.00						
16					\$0.00						
17					\$0.00						
18					\$0.00						
19					\$0.00						
20					\$0.00						
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31					\$0.00						
32					\$0.00						
33					\$0.00						
34					\$0.00						
35					\$0.00						
36					\$0.00						
37					\$0.00						
38					\$0.00						
39					\$0.00						
40					\$0.00						
41					\$0.00						
42					\$0.00						
43					\$0.00						
44					\$0.00						
45	Total Cash Spent		0.00		\$0.00						
46											
47											
48											
49											
50											
51											
52											
53											
54											
55											

	A	B	C	D	E	F	G	H	I
1	Invoices - please include details of all wire transfers								
2									
3	Program name				Local currency				
4	Account #	11-00-							
5									
6	Date	Vendor Name	Amount (local)	Exchange rate	Transaction fee	Amount USD	Category	Description	
7						\$0.00			
8						\$0.00			
9						\$0.00			
10						\$0.00			
11						\$0.00			
12						\$0.00			
13						\$0.00			
14						\$0.00			
15						\$0.00			
16						\$0.00			
17						\$0.00			
18						\$0.00			
19						\$0.00			
20	Total:				\$0.00	\$0.00			
21									
22									
23									
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38									
39									
40									
41									
42									
43									
44									
45									
46									
47									

A	B
1	Key for what goes in each column
2	
3	One-Time Expenses Purchases that are a single transaction - plane tickets, lodging (paid with your credit card), etc.
4	Daily Charges Daily expenses paid out - meals, incidentals, taxi/shuttle/parking, and business expenses (entry fees, guide fees, honoraria, etc.)
5	Invoices/Wires Any purchases paid in advance by a CIES credit card or a wire transfer (provider fee, coach bus, lodging, etc).
6	Country Enter the country where the transaction occurred
7	Date Date of the actual transaction
8	Amount (local) Enter the amount of money spent in whatever currency was used.
9	Exchange rate Use the exchange rate found in the "Exchange Rate" tab. This is to be used as an estimate to track expenses. This rate may be revised by SJSU Purchasing upon your return.
10	Total (USD) This total will automatically populate once you enter the exchange rate. The "Total" will be in USD.
11	Receipt Do you have a receipt? "Y" for yes. "N" for no. If you are not given a receipt, please write one including date, amount and what it was for. Please turn in hand written receipts with other receipts.
12	Category Please type one of the following categories for each transaction: meals/incidentals/taxi/shuttle/parking, business expense (This would be any entry fees/activity/internet, etc.)
13	Description Enter a brief description: lunch at Nando's for Program Leader and 12 students, Entrance to Prado Museum, etc.
14	Receipt # Please write a number on each receipt, enter the transaction data (OT, DC, or I/W) and enter the receipt number in this column. Please number receipts in chronological order and tape them to sheets of paper in order. Each tab in this transaction worksheet should have receipts numbered 1 to whatever.
15	PD Initials If there are two faculty leaders running the program, please enter the initials of the PL who did this transaction.
16	
17	Invoices Enter the information regarding cost (note currency), name of vendor receiving the wire, and a description of what was purchased. CIES Finance will notify you of the actual costs (amount, exchange rate, fees) for pre-payments that are invoiced. Please enter that information on the invoices tab.
18	Total Expenses This section tallies all payments and provides a balance of what money is still available from your budget so you can track your expenses.
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	A	B	C	D	E	F	G	H	I
1									
2	Program name						Local currency		
3	Account #	11-00-							
4									
5	Opening balance			\$0.00					
6							Admin and contingency fees		
7	Total cash withdrawn			\$0.00			Total available:		
8									
9	Total invoices			\$0.00					
10									
11	Remaining balance			\$0.00					
12									
13	Total spent			\$0.00					
14									
15									
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Appendix S - Travel Reimbursement Submission Guide



Below is a basic guideline for submitting your travel reimbursements after your program has ended.

If you have questions while filling out your travel reimbursement, please feel free to contact us at facultyledprograms@sjsu.edu and we will work on assisting you with the process.

FTS Travel Reimbursement

Submit your travel reimbursement request within 45 days from the end date of your program.

Log in to FTS (<http://fts.sjsu.edu>). Once you're logged in, you should see a link for "Travel Reimbursement". Click on the link and it should open up to the Travel Authorization you've submitted prior to your trip.

Fill in the applicable fields to record your expenses. You will need to enter:

1. Any expenses that were paid once and in advance in the "one-time charges" section.
2. You must enter your daily expenses for each day of your trip in the "daily charges" section of the reimbursement page. Daily expense items Include:
 - a. Meals*
 - b. Incidentals (up to \$7 dollars a day for tips and not for the first day of travel)
 - c. On-site ground transportation
 - d. Business expenses (entry fees, guide fees, etc.)

****Alcohol purchases are not reimbursable. Please modify the amount of the receipt to remove any alcohol purchases when entering your daily expenses.**

This is the **incorrect** way of entering your daily expenses:

Daily Charges						
INCORRECT ENTRY - This will get returned						
Daily Expense Detail Lines						
Date Of Trip	Depart/Return Time	Meals	Incidental	Taxi/Shuttle/Parking	Business Expense	Total Expenses for Day
06/20/2016	08:00	1,706.26	0.00	4,327.24	662.49	6695.99
Business Expense Explanation		Please see attached excel spreadsheet for details of daily expenses. Receipts attached as well.				

This is the **correct** way of entering your daily expenses:

Daily Charges						
Daily Expense Detail Lines						
Date Of Trip	Depart/Return Time	Meals	Incidental	Taxi/Shuttle/Parking	Business Expense	Total Expenses for Day
06/20/2016	00:19	13.01	0.00	12.30	242.55	267.86
06/21/2016	00:30	46.32	0.00	0.00	17.00	63.32
06/22/2016		17.66	0.00	6.13	0.00	23.79
06/23/2016		6.58	0.00	0.00	0.00	6.58
06/24/2016		46.91	0.00	0.00	0.00	46.91
06/25/2016	14:50	19.35	0.00	0.00	112.00	131.35
06/25/2016		0.00	0.00	0.00	28.41	28.41
06/26/2016		0.00	0.00	0.00	189.25	189.25
06/27/2016		0.00	0.00	0.00	277.17	277.17
06/30/2016		31.37	0.00	0.00	33.50	64.87
07/01/2016		9.31	0.00	35.92	166.70	211.93
07/02/2016		2.99	0.00	0.00	0.00	2.99
07/03/2016		0.00	2.80	55.99	0.00	58.79
07/04/2016		40.13	0.00	0.00	0.00	40.13
07/06/2016		13.34	0.00	61.09	66.67	141.10
07/07/2016		33.06	0.00	71.78	0.00	104.84
07/09/2016		37.41	0.00	92.93	0.00	130.34
07/10/2016	23:00	8.85	0.00	12.09	0.00	20.94
Business Expense Explanation		6/20- Luggage fees 6/21, 25, 27, 30, 7/1: cash advance fees 6/27: Bike rental (visa bill #1) 6/26: Wifi on ferry, acropolis & poseidon's temple 6/25: Tour guide 7/1- Luggage fees 07/06- Hard drive for student projects				

3. Enter your mileage for travel to/from and from/to airport in CA in “daily mileage”. You will need to upload supporting documentation, which clearly shows the number of miles traveled and the route you drove. See the example below:



210 N 4th St, San Jose, CA 95112 to Mineta San José International Airport Drive 3.0 miles, 9 min

210 N 4th St

San Jose, CA 95112

Get on CA-87 N

- ↑ 1. Head northwest on N 4th St toward E Julian St 6 min (1.5 mi)
- ↶ 2. Turn left onto E Taylor St 0.8 mi
- ⤴ 3. Use the right lane to merge onto CA-87 N via the ramp to US-101 N/San Francisco/San Jose International Airport 0.5 mi
- ⤴ 0.3 mi

Continue on CA-87 N to Skyport Dr. Take exit 8 from CA-87 N

- ⤴ 4. Merge onto CA-87 N 1 min (1.2 mi)
- ↘ 5. Use the right 2 lanes to take exit 8 for Skyport Drive toward Mineta San Jose Int'l Airport 0.9 mi
- ⤴ 6. Keep left at the fork, follow signs for Mineta San Jose International Airport 0.3 mi
- ⤴ 187 ft

Continue on Skyport Dr. Drive to Airport Blvd

- ↶ 7. Use any lane to turn slightly left onto Skyport Dr 44 s (0.3 mi)
- ⤴ 8. Merge onto Airport Blvd 0.1 mi
- ⤴ 0.1 mi

Mineta San José International Airport

1701 Airport Blvd, San Jose, CA 95110

These directions are for planning purposes only. You may find that construction projects, traffic, weather, or other events may cause conditions to differ from the map results, and you should plan your route accordingly. You must obey all signs or notices regarding your route.

4. Please provide any notes, details, or clarification of spending in the “additional trip details” section as needed.

5. Upload your receipts.

You will need to scroll down to the bottom of the web page and should see a button that says "Upload Attachments". You can upload copies of your receipts by clicking on this button and adding files from your computer to the FTS system. Typically, the best way is to tape your receipts onto a piece of paper (if they're small receipt papers), then scan the documents so it'll be easier to upload.

To ensure a quick reimbursement process, please number and paste your receipts in the order in which they are entered into your [FLP expense tracking worksheet](#). This will assist the finance team in making sure all expenses and receipts are accounted for.

6. Click "Save" to save your changes and "Submit" once you have entered all the items.

Cash Advances

If you have remaining money from your cash advances, you will need to follow the instruction provided to you by Accounts Payable and return the remaining cash advances.

When can I expect my reimbursement?

Typically, once the travel reimbursement obtains the highest level of approval in the system, Accounts Payable will have about two to four weeks (depending on the amount of requests they have) to review the travel reimbursement. Once Accounts Payable approves the travel reimbursement, then they'll be able to issue the reimbursement. This is a typical time frame but sometimes it may vary depending on what the faculty may be asked to clarify.

When can I expect my faculty pay?

Once your reimbursements are submitted in FTS, and they are reviewed and approved, then our Finance team will proceed with the paperwork for your pay. It typically takes about 5-10 business days to be processed from when our team submits the paperwork to HR.

Appendix T - Pre-departure Class Checklist

Suggested Topics/Activities to include in a Pre-departure Class

- Money Matters – Additional spending money, use of credit/debit cards, cash, travelers checks, bartering, average prices to expect, etc.
- What and how to pack for the program. What clothing is appropriate for the culture one will be visiting?
- Discuss medications and prescriptions by letting participants know that some medications may not be available for purchase on-site, and some prescriptions may be illegal (check with consulate/embassy to find out if medication is illegal). Advise participants to work directly with their personal physicians and counselors about their plans to travel and how to manage their health. You should refrain from providing specific medical advice about medications, vaccines, or over-the-counter medications.
- What to expect concerning the weather
- Language primer for participants traveling to non-English speaking countries. Learning the alphabet, counting, basic greetings can all be useful tools. There are many free podcasts available where participants can learn basic language skills independently.
- Establish group ground rules/norms
- Review the Commitment to Participate Form, the course syllabus, course expectations/overview, attendance policy, and grading
- Safety and security issues, possibly incorporating case studies of potential risk scenarios, and a review of emergency numbers.
- Ask participants to prepare and present a 10-15 minute long presentation about their own personal culture/identity and/or about a point of interest in the location you will be visiting
- Brainstorm one aspect of the participants' individual cultures that others may find surprising
- Review cultural norms of location the group will visit, as well as homestay norms, academic culture (if studying in a brick and mortar school), food culture, and street culture. Participants are expected to adapt to host culture, the host culture is not expected to adapt to the participants' cultures
- What it means to be a good steward and/or ambassador of SJSU.
- Individual and group goal setting for the trip

- Overview of activities available on-site for participant's free time
- Have participants write letters to their future selves to be returned after the program
- Identify participants with first aid training (Boy Scouts, Girl Scouts, Life guards, etc.)
- Identify participants with strong personalities who can step in and lead during a crisis
- Invite past participants to share their experience and to answer questions.
- Ask participants to like our FLP social media pages on [Facebook](#) and [Instagram](#) .

Appendix U - Registering Your Group with the U.S. Department of State's STEP Program


Click here to register: <https://step.state.gov/step/>

The above link takes you to this page:




You will click on "Create an Account".

Clicking on “Create an Account” will lead you to the following page:



Smart Traveler Enrollment Program
A SERVICE OF THE BUREAU OF CONSULAR AFFAIRS
U.S. Department of State



Sign In or [Create Account](#) [>>](#)
[Forgot Username](#) or [Password?](#)

Create Individual Account

* Required fields
If you would like to create an Organization/Group account, please click [here](#).

[Privacy Act Information](#)

The U.S. Department of State is committed to ensuring that any personal information received by our overseas U.S. Embassies and Consulates pursuant to the STEP process, whether in person or otherwise, is safeguarded against unauthorized disclosure. The data that you provide the U.S. Department of State is subject to the provisions of the Privacy Act (5 USC 552a). This means that the U.S. Department of State will not disclose the information you provide us in your STEP application to any third parties unless you have given us written authorization to do so, or unless the disclosure is otherwise permitted by the Privacy Act.

AUTHORITY: 22 U.S.C. 2715 and 22 U.S.C. 4802(b).

PURPOSE: To notify U.S. citizens/nationals in the event of a disaster, emergency or other crisis, and for evacuation coordination, the information solicited on this form may be made available as a routine use to appropriate agencies whether federal, state, local, or foreign, to assist the Department in the evacuation or provision of emergency service to U.S. citizens, or for law enforcement purposes. The information is also made available to private U.S. citizens, known as wardens, designated by U.S. Embassies to assist in communicating with the U.S. Citizen community in an emergency.

I have read the terms of the Privacy Act Notice *

Click on “Create Organization/Group Account.”

Use the Account Creation Wizard to create a record for your group. Each faculty-led program will have its own record.

Smart Traveler Enrollment Program
A SERVICE OF THE BUREAU OF CONSULAR AFFAIRS
U.S. Department of State

Sign In or [Create Account](#) Username Password >>
[Forgot Username](#) or [Password?](#)

Create Organization/Group Account

* Required fields

Account Information

Please protect your Username and password. You will need these to sign in to STEP to view or edit your trip information

Please protect your account by creating a secure password with a minimum of 12 characters and at least three of the following four groups from the standard keyboard:

- o Upper case letters (A-Z);
- o Lower case letters (a-z);
- o Arabic numerals (0 through 9); and
- o Non-alphanumeric characters: ! @ # \$ % ^ & * ()

Username:*

Password:*

Confirm Password:*

Select a Security Question:*

Answer to Security Question:*

Organization/Group and Point of Contact Information

Previous Next

After completing this Wizard, you will have created a new account with the Online Travel Registration System and will be able to register upcoming trips.

Enter your desired Username and Password. Your password must be a minimum of 12 characters, and use of at least three of the following:

- Upper case letters
- Lower case letters
- Arabic Numerals
- Non-alphanumeric Characters

Re-enter your Password: Confirm your password

Select a Security Question: Select a question/answer known only to you.

Enter the answer to your Security Question: This is case sensitive.

Click on the next title bar (as seen circled in orange above), “Organization/Group and Point of Contact Information”.

Complete account creation and register your group. Add all participant's email and phone numbers in the appropriate fields. You can add additional Email and Phone fields to account for the entire group.

Create Organization/Group Account

* Required fields

+ Account Information

- Organization/Group and Point of Contact Information

Your organization/group information will be saved to your profile and included in the information that is sent to the local U.S. Embassy or Consulate every time you enroll a trip. This information is vital to help us contact you if there is an emergency in the area while you are traveling overseas.

Organization/Group Name: *

First Name: *

Middle Name:

Last Name: *

Suffix:

Comments (For example: Health concerns, accessibility issues, other important travel information, etc.):

* Please provide **at least one type** of contact information in the United States. Email is preferred.

Email:

[Remove](#) Primary Email

[Add Additional Email](#)

Phone:

[Remove](#)

[Add Additional Phone](#)

PreviousNext

Proceed to the next step and complete your group's registration.

Appendix V - Participant Emergency Card Template



Student Emergency Information Card

Student Name _____ Date of Birth ____/____/____ Citizenship _____ <hr/> Study Abroad Program Name _____ Abroad Program Emergency Contact _____ address _____ <hr/> phone # _____ cell # _____ e-mail _____ Abroad Housing Emergency Contact _____ address _____ <hr/> phone # _____ cell # _____ e-mail _____ Home (U.S.) Campus Emergency Contact _____ address _____ city _____ state _____ zip _____ <hr/> phone # _____ cell # _____ e-mail _____	Family (U.S.) Emergency Contact _____ address _____ city _____ state _____ zip _____ <hr/> phone # _____ cell # _____ e-mail _____ Insurance Company _____ Policy # _____ 24 Hour Ph # _____ Embassy/Consulate _____ phone # _____ <hr/> address _____ Equivalent 9-1-1 Abroad _____ phone # _____ Nearest Hospital Abroad _____ phone # _____ <hr/> address _____ Passport # _____ Blood Type _____ Special Medical Conditions _____ <hr/> Wishes In Event of Serious Injury/Death _____ _____
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Appendix W - How to Replace a Lost Passport

What Should a U.S. Citizen Do if his/her Passport is Lost or Stolen Abroad?

You will have to replace the passport before returning to the United States. Contact the nearest [U.S. embassy or consulate](#) for assistance. Contact information for U.S. embassies and consulates is also available in our [Country Specific Information](#) pages. Ask to speak to the Consular Section to report your passport lost or stolen. If you have been the [victim of a serious crime](#), be sure to tell a consular officer about it as soon as possible so we can provide appropriate assistance. If you are scheduled to leave the foreign country shortly, please provide our consular staff with the details of your travel. We will make every effort to assist you quickly. You will also be directed to where you can obtain a photo for your replacement passport. In most cases, you will need to get a passport photo prior to your arrival at the consular section.

If you are notified by a relative or friend traveling abroad that his/her U.S. passport has been lost/stolen, you may wish to contact the Office of Overseas Citizens Services, U.S. Department of State in Washington, D.C, at 1-888-407-4747. That office will be able to help you put your friend or loved one in touch with the closest U.S. embassy or consulate. Your relative/friend must apply in person for a new passport at the U.S. embassy or consulate.

What Do I Need to Replace my Passport Overseas?

The following list identifies a number of documents/items you should take with you to the embassy/consulate. Even if you are unable to present all of the documents, the consular staff will do their best to assist you to replace your passport quickly. Please provide:

- A [Passport Photo](#) (one photo is required; get it in advance to speed the process of replacing your passport)
- Identification (driver's license, expired passport etc.)
- Evidence of U.S. citizenship (birth certificate, photocopy of your missing passport)
- Travel Itinerary (airline/train tickets)
- Police Report, if available
- [DS-11 Application for Passport](#) (may be completed at time of application)
- [DS-64 Statement Regarding a Lost or Stolen Passport](#) (may be completed at time of application)

Statement Regarding a Lost or Stolen Passport:

When you report the loss or theft of your passport, you must complete a statement describing the circumstances under which it was lost or stolen. You can use the [U.S. Department of State form DS-64](#) for this purpose, or simply execute a sworn statement before the consular officer describing what happened.

Police Report:

A police report is not mandatory but can help confirm the circumstances of the loss or theft. Don't spend time obtaining a police report if doing so will cause you to miss a flight or delay your travel unreasonably.

How Long is a Replacement Passport Valid?

Replacement passports are normally valid for a full ten years for adults or five years for minors. However, if you have urgent travel plans, we can issue a limited-validity, emergency passport that can be produced more quickly to allow you to return to the U.S. or continue on your trip. Once you return home, you can turn in your emergency passport and receive a full-validity passport.

Other complicating factors, such as multiple lost/stolen passports or borrowing money from the State Department to fund your trip home, may cause you to receive a limited passport. If you received a limited passport because of multiple lost/stolen passports or an outstanding loan, you will need to resolve those issues with the State Department before you can be issued a new passport.

Are Fees Charged to Replace Lost/Stolen Passports Abroad?

The normal passport fees are collected from applicants for replacement passports. Applicants unable to pay the fee will be asked to provide names of persons they feel would be able to assist them financially if there is sufficient time. See our information about [Financial Assistance to U.S. citizens abroad](#) and [Sending Money Overseas to U.S. Citizen in an Emergency](#).

However, if:

- the applicant is the victim of a serious crime; or
- the applicant is a victim of a disaster

and the applicant does not have and cannot reasonably be expected to obtain money to pay the fees before continuing travel, the passport fee may be waived and a limited-validity passport

will be issued. When the person applies for a full-validity passport upon their return to the United States, the regular passport fee will be charged for the replacement passport.

Can the U.S. Embassy Issue a Replacement Passport on a Weekend or Holiday?

Most U.S. embassies and consulates cannot issue passports on weekends or holidays when the embassy/consulate is closed. All U.S. embassies and consulates have after-hours duty officers available to assist with life or death emergencies of U.S. citizens abroad. Contact the nearest [U.S. embassy or consulate](#) after-hours duty officer for assistance if you have an emergency need to travel or have been the victim of a serious crime.

Duty officers must focus primary attention on life or death emergencies. In most cases, except for serious emergencies, a replacement passport will not be issued until the next business day.



FLP Risk Management

Emergency Action Protocol

Study Abroad and Away

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Emergency Response Guidelines and Protocols for SJSU Study Abroad & Away

San Jose State University

Introduction and Definitions

Introduction:

The Study Abroad and Away (SAA) office is committed to providing safe, educational experiences for participants on our Faculty-Led (FLP) and exchange programs. These guidelines and protocols are established to effectively mitigate emergencies, real or perceived, before they occur as well as prepare all parties to manage them while participating on an SJSU program abroad.

- The highest priority for San Jose State University and the Study Abroad and Away office is participant safety. SJSU will use all reasonable and available measures for responding to an incident (non-emergency or emergency).
- SJSU will handle emergencies according to the procedures listed below, except when mandated by circumstances or agencies outside of the University's control.

Definitions:

Participant - All students, faculty, staff, and community members who have enrolled in an SAA program taking place off-campus in either a domestic or international location.

Risk - The possibility that exposure to a hazard will result in a negative consequence (NAFSA's guide to Education Abroad for Advisers and Administrators, 2005).

Risk includes:

- Health - physical and psychological condition
- Safety - of an individual or group
- Security - range of conditions in a locale or region

Protocol - A protocol adhered to when a perceived and/or real emergency presents to participants while away on a sponsored SJSU program, which is intended to reduce the level of risk or provide support for the safety of participants.

Risk Management Responsibilities

Study Abroad and Away Office

Prior to Departure

- **In accordance with CSU Executive Order No. 1081**, provide mandatory Program leader Risk Management and Safety Training, that includes:
 - Health and Safety
 - Emergency Response Training
 - Communication From Abroad
 - Student Code of Conduct
 - Alcohol and Drug Policy
 - Disciplinary Procedures
 - Review of the role of Program Leaders
 - Overview of Insurance Policy
 - Other Program Specific Information
- **In accordance with CSU Executive Order No. 1081**, provide (non-program leader) participants with pre-departure orientation including information about the destination including health, safety, security, specific legal exposure or political restrictions related to their status in the country, CSU or campus policies and procedures for study abroad, and financial information.
- Enroll students in mandatory study abroad health insurance plan for the duration of the program, which includes medical evacuation and repatriation coverage that will be valid in the host country(ies).
- Collect Program Leader Health Forms, copies of program leader passports, and program Safety and Security Worksheets.
- Procure an additional Foreign Travel Insurance Policy insurance for programs traveling to high hazard locations.
- Collect completed student forms:
 - Commitment to Participate: Statement of Responsibilities
 - Student Health Form
- Monitor the U.S. Department of State's website and the Overseas Consular Services' website and review regular updates on world situations regarding health and safety.

On-site

- Monitor the U.S. Department of State's website and the Overseas Consular Services' website and review regular updates on world situations regarding health and safety.
- Maintain contact with program leader(s) and/or students.
- Monitor and respond to non-emergency correspondence from program leaders.
- Designate an on-call schedule for the SAA office, to manage emergency calls from program leaders.
- Remain in contact with SJSU International Programs Risk Committee, when emergencies are reported.

Program Leader

Prior to Departure

- Attend required program leader Risk Management and Safety Training.
- **In accordance with CSU Executive Order No. 1081**, the program leader must register all participants with the U.S. Department of State's Smart Traveler Enrollment Program (STEP) via their website at: <https://step.state.gov/STEP//>. Program leaders must also have located the closest U.S. Embassy and non U.S. Embassies for non-U.S. citizens in the destination(s) and provide students with Embassy contact information.
- Review the SJSU Student Code of Conduct.
- Read the FLP Program Leader Handbook.
- Develop an Emergency Binder containing:
 - Student Health Information
 - Student Emergency Contact Information
 - Student Travel Information (if students are traveling to destination independently)
 - Copies of Passports
 - FLP Non-Emergency and Emergency Protocol Guide
 - FLP Program Leader Handbook
 - Insurance Information
- Provide site-specific orientation sessions for enrolled participants.
- Inform student participants of the program leader's contact information while abroad.
- Discuss emergency procedures with students (e.g. if leader is incapacitated).
- Submit emergency contact information, complete itinerary, and Safety and Security worksheet for the program to the SAA. Additionally, program leaders must submit the program leader Health Form and a copy of their passport to the SAA.
- Review Student Health Forms to familiarize oneself with important medical issues and to identify any need for reasonable accommodations to be provided on-site.

On-site

- Review emergency protocols with participants during the program.
- Provide updates to the SAA, including but not limited to non-emergency and emergency

situations.

- Update Safety and Security Worksheet as needed for future programs.
- Avoid high risk activities and situations.
- Refrain from drinking on-site, as the program leader will be responsible for managing emergencies 24 hours a day/7 days a week, while on program.
- Program leaders must be able to reach participants within no longer than 45 minutes – 1 hour during the program in case of emergency. This means the program leader cannot travel to a different area/city/town without the participants during the program.
- Program leaders are responsible for participants throughout the duration of the program. If participants leave the area/city/town where the program is taking place they must inform the program leader of their travel plans, how to reach them while traveling, and their destination(s). Participants cannot travel farther than a 1-2 hour journey away from the group while on the program and must stay in the program's destination country for the duration of the program.

Student

Prior to Departure

- Attend all required orientation/information sessions offered by the Study Abroad and Away Office and the program leader(s)
- Review information available from the US Department of State, Centers for Disease Control, and discuss recommended immunizations, medications, and mental/physical health issues with a medical professional.
- Update the SAA (FLP programs) on any changes to:
 - Family and emergency contact information
 - Health history
- Provide the SAA (FLP programs) with the following information:
 - Copy of passport
 - Flight itinerary
 - Commitment to Participate: Statement of Responsibilities form
 - Student Health Form

On-site

- Provide program leader(s) and appropriate on-site personnel with travel plans and contact information prior to traveling independently while abroad. Participants cannot travel farther than a 1-2 hour journey away from the group while on the program and must stay in the program's destination country for the duration of the program.
- Provide the program leader and/or the SAA with contact information in host country.
- Remain aware of health, safety, and political climate in the host country.
- Stay in communication with a parent, friend, or other family member while in the home country.

SJSU International Programs Risk Committee

Prior to Departure

- Establish criteria for risk assessment in relation to study abroad.
- Approve study abroad risk assessment policies and procedures.
- Ensure compliance with study abroad risk assessment policies and procedures.
- Monitor ongoing security concerns related to study abroad sites.
- Review and assess whether risks related to proposed travel are acceptable to participants and to the institution.
- Provide program information to the On-Campus Study Abroad Emergency Response Team; including but not limited to program dates, destinations, program leader names and contact information, and participant lists.

Managing Risks and Emergencies

The safety of our participants is our top priority, and your first responsibility as a program leader managing an emergency is to safeguard the well-being of program participants. In order to do so effectively, you should thoroughly read and become familiar with the Non-Emergency and Emergency Protocols covered in this guide. Be sure to take a hardcopy with you on your program.

When a crisis presents it is imperative to remain calm. The first order of business is to help the participants get through any difficult time. The Study Abroad and Away (SAA) office has experience dealing with crises and are here to assist you in any way before, during and after a crisis.

It is important to understand how emergency prevention can assist you in the event you are faced with a crisis or emergency while studying abroad.

Emergencies can occur, whether students are at home or studying abroad. Emergencies can become more likely when leading a group abroad due to an array of factors including travel mishaps, cultural unfamiliarity, and language barriers. This Non-Emergency and Emergency Protocol Guide will provide you with some tools to cope with different kinds of emergencies when leading a program abroad.

Moreover, this guide will provide you precautions for avoiding certain minor emergencies.

It is crucial for program leaders leading participants abroad to understand the importance of emergency planning, a necessary tool for all people who travel abroad. Understanding the basics of emergency planning will allow you to develop comprehensive support strategies in order to assist and prepare you for emergencies encountered abroad.

Determining whether or not the reported incident is an emergency

The SJSU staff member who begins management of the incident will make an assessment of the situation based on all the available information.

The definition of an emergency, as set forth below, will guide this decision.

Emergencies are situations that pose a legitimate and impending risk to, or have already disrupted, the safety and well-being of SJSU program participants. Emergencies can include situations involving a single program participant, multiple program participants, or all program participants.

These include:

- Situations affecting multiple participants or entire program
 - Political/civil unrest
 - Terrorist activity or threat
 - Natural or human disaster (earthquake, flood, hurricane, fire, nuclear incident)
- Situations affecting individual participants:
 - Death
 - Serious illness or injury (including attempted suicide, mental health issues)
 - Assault (physical/sexual)
 - Missing participant(s)
 - Arrest
 - Incapacitated program leader(s)

Managing a situation that is not an emergency

At times incidents occur that should be reported to make the SAA aware or to ask for additional guidance or advice, but doesn't qualify as an emergency. We call those incidents "non-emergencies." A non-emergency is a situation that is not life threatening, though it does cause concern, stress, and inconvenience in the life of the program participant, multiple program participants, or all program participants.

Some examples include:

- Stolen passport
- Pickpocketing
- Sickness
- Non-compliance issues that do not result in harm to self or others
- Intoxication

If a non-emergency occurs during a program, the program leader should log the incident in the following way:

- If there is no response needed and the program leader is simply notifying the SAA office for their information only, the program leader should complete the [FLP Non-Emergency FYI](#)

[Reporting form.](#)

- If the non-emergency situation requires additional guidance or advice from the SAA, the program leader should email the SAA office at spartansabroad@sjsu.edu and include **NEEDS RESPONSE** in the subject line.
- Depending on the severity of the incident, a Preliminary Incident Report Form or a Disciplinary Form may need to be completed and sent to the SAA at spartansabroad@sjsu.edu.

The SAA staff will monitor the non-emergency reporting forms and email account daily.

FYI Reports

FYI Reports will be monitored and read by a designated SAA staff member within 24 hours of receiving them. FYI reports will not result in a response from SAA.

NEEDS RESPONSE Emails

Needs Response emails will be read at the beginning of each business day and on the weekends by a designated SAA staff member.

The SAA will respond to the program leader with information, advice or further guidance as requested.

Emergency Guidelines for Program Leaders

Preparations

1. Program leaders serve as the primary contact and manager during an emergency. It is imperative that the program leader be accessible by telephone 24 hours a day for the duration of the program.
2. Per **Executive Order 1081**, the program leader will register their FLP group in the State Department's Smart Traveler Enrollment Program (STEP) at <https://step.state.gov/step/>.
3. The program leader should carry a photocopy of each participant's passport (photo and signature pages), Health Information, and Emergency Contact Information in a central file/binder accessible throughout the program.
4. On-site orientation will be provided to all participants that will include information on personal safety and instruction in the procedures to be followed in case of an emergency.
5. The contact information for a designated on-site emergency liaison (partner institution, program provider, or a capable student if not working with an institution or program provider) should be distributed to all participants. If the program leader is incapacitated, the emergency liaison should be

contacted immediately and provide temporary management of the program if possible.

6. The program leader will develop and test a telephone-tree rapid communication system with all participants.

7. All participants will be reminded of the need to leave an itinerary and contact information, if possible, for all travel outside of the program city. Participants are not allowed to travel individually, overnight, outside of the program city (further than a day trip) for the duration of the program.

In an Emergency

1. In the event of an emergency situation, it is the first responsibility of the program leader to provide for the immediate safety and security of all participants.

2. In the event of an emergency situation, it is the second responsibility of the program leader to immediately contact SJSU UPD at **001-408-924-2222**.

3. The program leader should refer to the Emergency Action Protocols developed for SJSU Faculty-Led Programs.

Preliminary Incident Report Form (PIRF)

In any incident, it is a good idea to complete a Preliminary Incident Report Form (PIRF). Any time medical personnel or law enforcement are engaged, this report MUST be completed. This report will help you organize information and your plans. It also is a simple fact sheet that you can then read and/or e-mail to spartansabroad@sjsu.edu. This provides the SAA with the information needed to start to assist you in any kind of emergency. This report is part of an ongoing log you will keep of any incident.

Please be sure to carry several hard copies of this report with you while you are traveling.

Reporting incidents to:

For emergencies, the first call you make should be to 001-408-924-2222. You can call collect if needed.

For non-emergencies and questions: Please complete the [FYI Reporting Form](#) (if no response needed) and/or email spartansabroad@sjsu.edu (write Needs Response in the subject line) and attach the form.

A blank report is on the next page.

On-site FLP Preliminary Incident Report Form (PIRF)

CALL University Police Department (UPD) 24/7: 001-408-924-2222

Name of caller: _____

Position of caller (circle one): Program Director Student Other

Name of person answering call at

SJSU: _____

Date: _____

Time: _____

_____ Your location: city or town, and

country: _____ What is your actual

location (hotel, museum, hospital etc.)? _____

Type of Emergency (circle one)

Political/civil unrest

Natural or human disaster

Death Arrest

Serious illness or injury

Assault (physical/sexual)

Missing participant(s)

Terrorism

Incapacitated Program Director(s)

Other _____

What is your situation? (Write a brief description.)

Is the emergency under control now?

Are all participants accounted for and safe?

What do you need from SJSU to assist you right now?

What questions do you have for SJSU?

How can SJSU reach you?

_____ - _____
(Country Code) (City Code) (Phone Number)

Email address: _____

How long will you be at this number? _____

Any other details needed at SJSU?

Next steps:

- 1) Keep notes of the incident, tracking any and all developments. If necessary contact our insurance company for medical assistance or for evacuation.
- 2) Do your best to keep calm and manage the safety of the participants.
- 3) Ask students to refrain from disclosing information about the emergency to outside parties and on social media platforms while the emergency is on-going.

- 4) Monitor your phone and email for additional correspondence from SJSU if the emergency is on-going.

Emergency Action Protocols

The following Emergency Action Protocols are step-by-step *guides* for responding to various kinds of emergencies. Every situation will be unique and you as program leader will have to adapt to manage a particular situation. The important things to remember in every single case:

- ensure the safety of the group
- utilize the support available to you (local support and support from SJSU—you do not have to have all the answers yourself)
- document every situation thoroughly including noting the time each time you add to your log
- **The first call you make to SJSU to report an incident is to 001-408-924-2222.**

These protocols are checklists, but things may happen in a different order than they appear here...again, this is a *guide*, not an absolute that must be followed.

Please read these protocols many times so that should an emergency occur, you are already familiar with the checklists/steps that may be followed. **It is also a good idea to carry hard copies of these with you.**

Student/Program Leader minor illness/injury

1. Ask the student/program leader to describe their symptoms.
2. Program leader conveys three messages:
 - 1. *I'm sorry you're not feeling well.***
 - 2. *You are going to be OK.***
 - 3. *You are not alone.***
3. Program leader supports student/program leader in determining best solution (over the counter medicine, rest and fluids, bandage, etc.). If medical attention is warranted, please contact local medical care right away.
4. Write notes about the situation...name, condition, treatment plan.

5. Monitor (check on ill/injured person at regular and reasonable intervals to assess condition).
6. Complete the [FLP Non-Emergency FYI Reporting form](#). Include name, condition, treatment plan, and progress so far.
7. Complete another [FLP Non-Emergency FYI Reporting form](#) when the condition is resolved.
8. If symptoms escalate, call local medical care. Have the student contact OnCall International insurance to open a case and have them assist with identifying a medical provider.
9. If condition significantly worsens, this qualifies as an emergency and you should start a Preliminary Incident Report Form.

Student/Program leader major illness/injury

1. Contact local medical care--call the country's equivalent of 911 for emergency illness/injury; you can go to any local medical care for emergency and non-emergency situations to ensure the safety of all members of the group.
2. Start a Preliminary Incident Report Form to organize needed information and to keep an ongoing log (including times) as the situation progresses.
3. *If there is only one program leader and a student is ill/injured*, monitor the student illness/injury. If the student needs medical attention, accompany the injured/ill student to the physician or coordinate with a program provider/local contact to assist you. If you do not have a program provider/local contact, identify a student who can assist in coordinating the group while you accompany the injured/ill student to the doctor.

If the program leader is ill or injured, coordinate with a program provider/local contact to assist you with the student group. If you do not have a program provider/local contact, identify a student who can assist in coordinating the group while you visit the doctor. Contact SJSU to notify them of your illness/injury.

If there are two program leaders, divide duties between program leaders (e.g. program leader A will travel to a healthcare facility with the student; program leader B will take the rest of the group to hotel, next activity, meal, etc.). If a program leader is ill or incapacitated, ask a local contact to accompany program leader to medical care, while the other program leader stays with students. Be sure to include who is accompanying who on the Preliminary Incident Report Form.

4. As soon as the situation is stable (meaning as soon as the ill or injured person has gotten to appropriate medical care, and the rest of the group is safe and accounted for), call **001-408-924-2222** with Preliminary Incident Report details. SJSU will notify insurance and the person's emergency contact.

5. If medical evacuation is necessary, this will be coordinated through our insurance company. Student and faculty Evacuation Policy is through OnCall International:

OnCall International (Policy Number: 22INT06941)

Outside of the U.S. and Canada: +1-603-952-2688

Within the U.S. or Canada: 1-833-425-5103

Email: mail@oncallinternational.com

Text only: 603-945-0103

6. The insurance company will most likely contact the program leader directly for details as needed.

7. SJSU will let the program leader know if the emergency contact is planning to travel to be with the injured/ill person.

8. The program leader should direct any press queries to the SJSU [Strategic Communications & Marketing \(StratCoM\)](#) Office. The program leader can tell the press, "Please contact the SJSU Strategic Communications & Marketing office."

9. If the student consents, brief the group on the person's health status. If the student does not consent, do your best to convey to the group that the situation is being addressed appropriately and that the person has asked that everyone respect his/her privacy.

10. If a student is hospitalized, the program leader must stay in that location to be with the student and coordinate with a program provider/local contact/responsible student to assist you with the group. If determined to be appropriate, after consultation with SJSU, the other program leader/local contact may continue the planned itinerary with the rest of the group. In some cases, a representative from SJSU may travel to join the injured/ill student.

11. If a program leader is hospitalized, when possible/appropriate, a local guide can serve as the other program leader to continue the planned itinerary with the group. In some cases, a representative from SJSU may travel to join the group and serve as the program leader.

12. Throughout the incident, the program leader will be in regular communication with the Incident Manager. Changes in status should be noted on the ongoing Preliminary Incident Report Form log and will also be kept in a log at SJSU.

13. Direct any e-mail correspondence to spartansabroad@sjsu.edu.

14. The program leader will submit all notes on the situation upon returning to SJSU. Please keep them in a safe place.

15. The program leader will debrief about the incident with the SAA upon return to SJSU.

Transportation accident

1. Account for everyone in the group.

2. If police/emergency people are not on the scene, call them (use the country equivalent of 911, located on your Safety and Security document).

3. Identify any injured people and direct emergency personnel to them.

4. Ensure the safety of all members of the group.

5. *If there is only one program leader and a student is ill/injured*, monitor the student illness/injury. If the student needs medical attention, accompany the injured/ill student to the physician or coordinate with a program provider/local contact to assist you. If you do not have a program provider/local contact, identify a student who can assist in coordinating the group while you accompany the injured/ill student to the doctor.

If the program leader is ill or injured, coordinate with a program provider/local contact to assist you with the student group. If you do not have a program provider/local contact, identify a student who can assist in coordinating the group while you visit the doctor. Contact SJSU University Police (001-408-924-2222) to notify them of your illness/injury.

If there are two program leaders, divide duties between program leaders (e.g. program leader A will travel to health care facility with student; program leader B will take the rest of the group to hotel, next activity, meal, etc.). If a program leader is ill or incapacitated, ask a local contact to accompany program leader to medical care, while the other program leader stays with students. Be sure to include who is accompanying who on the Preliminary Incident Report Form.

6. Start completing the Preliminary Incident Report Form. Be sure to note times and all actions taken.

7. As soon as the situation is stable (meaning as soon as the ill or injured person(s) has gotten to

appropriate medical care, and the rest of the group is safe and accounted for, call 001-408-924-2222 with Preliminary Incident Report details.

8. SJSU will notify the insurance company and the person's emergency contact.

9. If medical evacuation is necessary, this will be coordinated through our insurance. Students and faculty will use OnCall's evacuation policy if evacuation is necessary:

OnCall International (Policy Number: 22INT06941)

Outside of the U.S. and Canada: +1-603-952-2688

Within the U.S. or Canada: 1-833-425-5103

Email: mail@oncallinternational.com

Text only: 603-945-0103

10. Our insurance will contact the program leader for more information as needed.

11. Get the non-injured students and a program leader (if possible) back to the accommodation location to regroup.

12. SJSU will let the program leader know if the emergency contact is planning to travel to be with the injured/ill person.

13. The program leader should direct any press queries to the SJSU [Strategic Communications & Marketing \(StratCoM\)](#) Office. The program leader can tell the press, "Please contact the Office of Strategic Communications & Marketing at SJSU."

14. If a student is hospitalized, one program leader must stay in that location to be with the student. If determined to be appropriate after consultation with SJSU, the other program leader may continue the planned itinerary with the rest of the group.

15. If a program leader is hospitalized, when possible/appropriate, a local guide can serve as the other program leader to continue the planned itinerary with the group. In some cases, a representative from SU may travel to join the group and serve as the program leader.

16. If the injured student(s)/program leader consent, brief the rest of the group on their health status. If not, tell the group that the situation is being taken care of and the people involved have asked that the group respect their privacy.

17. Throughout the incident, the program leader will be in regular communication with the Incident Manager. Status changes and updates should be noted on the ongoing Preliminary Incident Report Form log and will be kept as a log in SAA.

18. Direct any e-mail correspondence about this incident to spartansabroad@sjsu.edu.
19. The program leader will submit all notes on the situation upon returning to SJSU. Please keep them in a safe place!
20. The program leaders will debrief about the incident with the SAA upon return to SJSU.

Robbery or Mugging

1. Respond to the student/program leader victim immediately.
2. Be sure the person is in a safe place and reassure them of their safety.
3. All involved staff should convey three messages:
 - 1. I believe you;**
 - 2. You are not alone; and**
 - 3. We are sorry this happened to you.**
4. If police are not on the scene, call the equivalent of 911 (in your Safety and Security document).
5. Obtain medical assistance as needed.
6. Start a Preliminary Incident Report Form/log.
7. Suggest that the person file a police report and accompany them to do so.
8. As soon as the situation is stable (meaning as soon as the mugged person is safe and attended to, and the rest of the group is safe and accounted for) call **001-408-924-2222** with Preliminary Incident Report details.
9. Administrators at SJSU will discuss the circumstances of the situation with you and help determine the next steps for the group (perhaps changing an accommodation site, plans for the rest of the day or next day, etc.).
10. Direct any e-mail correspondence about this incident to spartansabroad@sjsu.edu.
11. The program leader will submit all notes on the situation upon returning to SJSU. Please keep them in a safe place.

12. The program leaders will debrief about the incident with the SAA upon return to SJSU.

Missing student

1. A missing student is one who has been absent for over 24 hours.
2. Try to determine when the student was last seen.
3. Start Preliminary Incident Report Form/log.
4. Call **001-408-924-2222** (University Police).
5. SJSU will contact the student's emergency contact.
6. Call local police and file a missing person's report. Ask them to check clinic and hospital admissions and coroner's records for unidentified bodies.
7. Notify the [U.S. Embassy](#).
8. Provide information and reassurance to other students as appropriate.
9. Administrators at SJSU will work with you to manage the situation and ongoing group plans.
10. Direct any e-mail correspondence about this incident to spartansabroad@sjsu.edu.
11. The program leader will submit all notes on the situation upon returning to SJSU. Please keep them in a safe place.
12. The program leaders will debrief about the incident with the SAA upon return to SJSU.

Death of a student or program leader

1. Verify the identity of the student or program leader.
2. If they are not already on scene, notify local police. (Use the equivalent of 911, listed in your Safety and Security document).
3. Gather as much information about the circumstances as possible and start the Preliminary Incident Report Form. Be sure to write down the time of day each time you make a log entry.
4. **Call 001-408-924-2222 immediately.** This is critically important because we want the parent/guardian to hear from an SJSU administrator, not CNN or other means.

5. To that end, do NOT contact the student's or program leader's emergency contact. SJSU will handle that. SJSU will notify the program leader or the students once the emergency contact has been reached.

6. Make sure the rest of the group is in a safe location—remove them from the scene to a safe and private location as quickly as possible— the program leader, program provider, or local contact should stay with this group. Ask that students refrain from texting or calling anyone until SJSU has informed you that the emergency contact has been notified.

7. Call the [U.S. Embassy](#) or Consulate (or if the person is not an American citizen, call their embassy). The Consular Officer is responsible for obtaining the death certificate and other necessary documents for preparing a Foreign Service Report of Death.

8. SJSU will contact OnCall Insurance for repatriation and all insurance concerns. A representative from the insurance company will probably speak directly to a program leader regarding plans and details.

a. **Student Policy:** OnCall International (Policy Number: 22INT06941)

Outside of the U.S. and Canada: +1-603-952-2688

Within the U.S. or Canada: 1-833-425-5103

Email: mail@oncallinternational.com

Text only: 603-945-0103

b. **Faculty Policy:** CHUBB/ACE Travel Assistance Program (Policy Number: GLM N04950872R)

Outside of the U.S. (direct dial): 001-630-694-9764

Within the U.S. (toll free): 1-855-327-1414

Email: medassist-usa@axa-assistance.us

9. Notify the host organization/institution (if relevant). Do not provide any details at this time. A police investigation will be conducted first.

10. Notify the rest of the group. Ensure that group discussion, one on one counseling, and access to SJSU's counseling center are available to the extent possible.

11. The program leader should direct any press queries to the [Strategic Communications & Marketing \(StratCoM\)](#) Office. The program leader can tell the press, "Please contact the Office of

Strategic Communications & Marketing at SJSU.”

12. You will be in regular contact with SJSU throughout this event and SJSU administrators will provide as much support as possible. Please be sure to keep good notes on the situation. Keep your notes in a log format including timestamps during which you are documenting, as these will become part of an official incident report. The program leader will submit all notes on the situation upon returning to SJSU. Please keep them in a safe place.

13. Direct any e-mail correspondence about this incident to spartansabroad@sjsu.edu.

14. The program leader will debrief about the incident with the SAA upon return to SJSU.

Sexual Harassment/Sexual Assault/Rape

1. Respond immediately. All involved staff should convey to the survivor three messages:

1. I believe you;

2. You are not alone; and

3. We are sorry this happened to you

2. Inform the survivor that faculty and staff program leaders are not a confidential resource but will try to maintain the privacy of the survivor, recognizing the need to balance their privacy with safety considerations and their duty to report.

3. Listen attentively and compassionately to the details. Inform the survivor that you are required to provide a report to the Title IX Coordinator at SJSU, which includes:

a. Names of students/persons involved

b. Details of the situation

c. Telephone number where the program leader(s) can be reached

d. What assistance is needed

e. Confirmation of the safety of the individual(s) involved.

4. Remind the survivor of the options available regarding medical care, counseling, and reporting.

Remember, you can encourage (but not force) the survivor to report the incident to local authorities and/or the program site or seek medical care.

a. If a person has just been raped and/or has been sexually assaulted and they agree to medical care, tell them to not bathe, use the bathroom, brush their teeth, change their clothes, etc. This is not for medical reasons, this is to help obtain evidence that may be used in court.

5. Start a Preliminary Incident Report Form (either in the presence of the student or not depending upon their wishes above).

6. Call 001-408-924-2222 as soon as possible.

7. Report to SAA (spartansabroad@sjsu.edu) within 24 hours of the incident, if any type of sexual harassment, including sexual violence, has been reported. The SAA will connect you with an SJSU, Title IX Coordinator. The Title IX Coordinator is responsible for ensuring that there is an appropriate institutional response to any complaint of sexual harassment, sexual violence or student sexual misconduct.

8. Administrators at SJSU will get in touch to help you decide the best course of action (for the survivor and for the accused perpetrator if they also happen to be in the group); and will provide counseling by phone or recommend in person counseling through the student insurance plan.

9. If medical evacuation is warranted, SJSU will contact our insurance to arrange the details. The insurance company will likely also communicate directly with the program leader.

10. Administrators at SJSU will work with you throughout the event to determine the best course of action for all involved, including the rest of the group and the group's plans.

11. Direct any e-mail correspondence about this incident to spartansabroad@sjsu.edu.

12. The program leader will submit all notes on the situation upon return to SJSU. Please keep them in a safe place.

13. The program leader will debrief with the SAA about the incident upon returning to SJSU.

Large scale catastrophic incident (natural disaster, terrorism, severe political unrest)

1. Check the status of all group members. If the group is not together, work with your local provider to make a plan to locate the rest of the group.
2. If anyone is injured or deceased, alert emergency personnel. If possible, the program leader should stay with the injured/deceased. If there is only one program leader, designate a student group leader and tell them to take the group to a particular location and stay there.
3. Get as many of the group as possible to a safe location. Then, work with emergency personnel to take care of the injured/deceased. Follow the protocol for injury/death of a student when you are able to.
4. Start Preliminary Incident Report Form/log.
5. If possible, **call 001-408-924-2222**, or ask someone to do so.
6. If you are able to reach SJSU, SJSU will inform our insurance company, who will provide emergency management assistance to program leaders.
7. If you are not able to reach SJSU, if possible, contact the local [U.S. Embassy](#) to explain your situation and get advice and assistance. Consider contacting local contacts if they might have the ability to provide assistance (recognizing that such an event may have rendered them unable to provide assistance).
8. Depending upon the scale and nature of the event, there will be many emergency management resources on site, including local emergency responders, international NGOs, military, etc. Utilize whatever resources are available to you to ensure the safety and security of your group.
9. If you need to evacuate and you are not able to reach SJSU, contact the insurance provider. Students and faculty will use OnCall's evacuation policy:

OnCall International (Policy Number: 22INT06941)

Outside of the U.S. and Canada: +1-603-952-2688

Within the U.S. or Canada: 1-833-425-5103

Email: mail@oncallinternational.com

Text only: 603-945-0103

10. Use all local resources: local contacts, [U.S. Embassy](#), emergency personnel, international NGOs, crisis responders, etc. to help you get out of the dangerous area.
11. Communicate your plans to a local contact and ask them to repeatedly try to reach 001-408-924-2222 at SJSU until they are successful.
12. As soon as you have communications, call **001-408-924-2222** or e-mail spartansabroad@sjsu.edu to inform SJSU where you are, your situation and discuss your plans.
13. Direct all e-mail correspondence about this incident to spartansabroad@sjsu.edu.
14. The program leader will submit all notes on the situation upon return to SJSU. Please keep them in a safe place.
15. The program leader will debrief about the incident with the SAA upon return to SJSU.

Civil unrest

1. If you learn about this while at your lodging site, make sure all students are accounted for and tell them to stay where they are. If you learn about this while at an activity, get to a safe location and keep everyone together.
2. If any students are not accounted for, do your best to reach them quickly.
3. Confirm details about affected areas by talking with local contacts and contacting the [U.S. Embassy](#).
4. Start a Preliminary Incident Report Form/log.
5. If possible, call at SJSU: **001-408-924-2222**.
6. SJSU will alert the Insurance company.

If you are able to communicate with SJSU (phone lines/internet are up), you will work with SJSU to determine a plan. Depending on the situation, this may include:

- a. Stand fast—staying at your current location and wait for things to quiet down (this is usually the case for smaller events that are likely to resolve quickly).
- b. Move to another nearby location—if the particular area where you are staying/doing

activities is not safe, and it is possible to move, move the group to a safe part of the city/area. (For example, say there is a violent demonstration within 4 blocks of your hotel—that is too close for comfort. It may be easy to move to a hotel in another part of town without crossing the demonstration). If you are not able to move on your own and are in danger, you will evacuate.

c. Evacuate—if the situation escalates and is expected to last for some time, the group will evacuate the area—possibly to another city or town in the same country, or possibly to another country. Worst case scenario would be returning to the U.S. If a crisis evacuation is necessary, OnCall insurance will manage the evacuation for the entire group (including the Faculty Leader). Faculty can initiate the request for evacuation with OnCall directly. Notify SAA as soon as possible about a possible evacuation. The program leader will be in regular contact with SJSU and will also speak with our insurance company.

Evacuation Insurance: OnCall International (Policy Number: 22INT06941)

Outside of the U.S. and Canada: +1-603-952-2688

Within the U.S. or Canada: 1-833-425-5103

Email: mail@oncallinternational.com

Text only: 603-945-0103

If you are not able to communicate with SJSU:

1. Determine the best course of action for the group by following the guidelines above (Stand fast, move to a nearby location, evacuate).
2. If you determine that you have to evacuate without being able to contact SJSU, use all local resources: local contacts, [U.S. Embassy](#), emergency personnel, international NGOs, crisis responders, etc. to help you get out of the dangerous area.
3. Communicate your plans to a local contact and ask them to repeatedly try to reach SJSU at 001-408-924-2222 until they are successful.
4. As soon as you have communications, **call 001-408-924-2222** or e-mail spartansabroad@sjsu.edu to inform SJSU where you are, your situation and discuss your plans.

5. Direct any e-mail correspondence about this incident to spartansabroad@sjsu.edu.
6. The program leader will submit all notes on the situation upon return to SJSU. Please keep them in a safe place.
7. The program leader will debrief about the incident with the SAA upon return to SJSU.

Appendix Y - Travel Photography Tips

SJSU | GLOBAL EDUCATION
AND INITIATIVES

Travel Photography Tips

FACULTY-LED PROGRAMS

Each place we visit has its own particular look, character, and ambiance.

Understanding the customs and traditions of a place is helpful.

Always have your camera with you and always keep your eyes open. Serendipity plays an enormously important role in travel photography.

Whether you are using a digital camera or a mobile device, make sure your camera settings are on the highest resolution available on the device so that we may use these photos for printed materials. Remember to send us your photos from your phone's cloud/back-up storage and not directly from the device as many phones save a lower resolution photo to the phone with the higher resolution on back up. Natural light is the easiest and best to photograph under. A successful photo has a balance of context and aesthetics.

■ Landscapes and the Environment

Think about how the place makes you feel, what kind of emotions it stirs in you. Then look for ways to get those qualities and feelings onto film. Is it a rocky, violently wave-washed coast or a bright and sandy one?



★ *It's always great to get shots of students and faculty "interacting" with their environments.*

■ Cities and Towns

Like landscapes, each city and town has its own look and feel—a distinctive setting, architecture, or skyline or a famous local site. There's often at least one thing that is unique. When covering a town, city or even a small village, you can easily capture a sense of place by taking a wide shot that shows the setting, skyline, or another view that captures a feeling for the whole location; landmarks that the place is famous for; the life of its inhabitants.



★ *Showing students participating in a local exercise class gives this photo a more personal touch.*

■ Monuments and Other Buildings

When you are photographing buildings, statues, or other monuments, think about what they represent before you shoot. Get the idea of the subject, then think of the weather, light, angle, etc. that best communicates it.



★ *The visual immensity of a monument such as the Great Wall of China is a given. Whenever possible include students in your shots.*

■ Photographing the “Locals” and their Culture

It's best to ask permission if you want to photograph someone, especially if you are working in close. Engage them before you pull out your camera. Learn at least how to say “hello” and “May I make a photograph?” in the local language—just showing that you've made a little effort helps. If you are shooting a street scene or a wide shot of a market, you can't run up to everyone and ask if it's OK. In general, people do not mind this sort of photography—it's only when they're singled out that they get uncomfortable. But not always. Be sensitive to the scene in your viewfinder.



■ Photographing Students and Friends

Don't forget that you can also use your friends to make your other photographs more effective. When you are taking pictures of your friends and fellow students, try to strike a balance between a picture of them and a picture of the place. Make use of them to give your images life and scale.



★ *Make use of your fellow students to give your images life and scale.*

■ SJSU Spartan Pride

Make sure to bring Spartan gear with you for those “SJSU was here” photo moments. For these types of photos, utilize SJSU clothing, flags, signs, or any other SJSU branded items you may have. Some ideas for showing off your Spartan pride are in front of iconic landmarks/buildings, posed group shots, locals interacting with Spartan gear, or “classroom” moments showcasing the academic side of the program while wearing or featuring SJSU branded clothing/items.



■ Videos

Video is a great way to capture more than just moments of your experience abroad. If you do decide to share your videos with us to use, please keep in mind the following: Mobile device and camera resolution should be set to the highest resolution. When sharing your mobile device video footage, use the video from your mobile's back-up storage as the video that is saved directly to your device is generally a modified lower resolution. If you put together a montage of your own, make sure you do not use music that is copyrighted. There are many places online that offer free music that can be found with a quick search. Please avoid footage that includes alcohol.

*Excerpted From Photography Field Guide: Travel
By Robert Caputo, National Geographic*

Appendix Z.1 - New FLP Program Proposal Packet (Downloadable [HERE](#))

Appendix Z.2 - Existing FLP Program Proposal Packet (Downloadable [HERE](#))

Appendix Z.3 -FLP Site Visit Development Form

GUIDELINES FOR SJSU FACULTY/STAFF DEVELOPMENT OF A FACULTY LED PROGRAM (FLP) AT SJSU

San José State University and Global Education and Initiatives are committed to creating and supporting SJSU faculty-led programs. FLPs are an exciting and experientially based approach to offering SJSU courses off-site around the globe. When developing a new FLP it is important to consider many moving parts: contact hours with students to adhere to the definition of a credit hour; the safety and security of our faculty, staff, and students; the costs associated with running a viable FLP; etc.

Programs may be developed by working closely with a pre-approved third-party provider, institutional partners, or be entirely self-designed (for those with a great deal of experience in the proposed host country). New FLPs can use third-party providers that have not been pre-approved, but please keep in mind developing new provider contracts can take several months longer than working with a pre-approved provider.

San Jose State University and Global Education and Initiatives (GEI), in partnership with SJSU academic units and schools, facilitate and develop FLPs for SJSU students. FLP proposals should originate with faculty and should carry the endorsement of appropriate departmental and school administrators.

Basic features of Faculty-Led Programs:

Duration: Programs typically are 2-6 weeks in length. The duration of the program should be determined by the amount of time necessary to adhere to the number of credit hours being offered. Please reference the Credit Hour Guideline Worksheet for guidance in determining the length of your proposed FLP (travel time to the location and to return to the US should not be included in your calculation).

Leaders: Typically it is suggested to have one faculty member for every 10-16 students participating in the program. There are occasions when that number may increase, but this increased staffing should be discussed with the GEI in advance.

Students: Group size is determined by what the budget can support without becoming too expensive for the students. Typically, 10-24 students can participate on a given program, however the exact number of participants can depend on staffing, program model, on-site capacity, and price.

An FLP includes: Pre trip meetings, a required student orientation/safety meeting, a suggested faculty finance training, a required faculty safety and security training (including CPR and First Aid certification), the actual trip, and it is encouraged to include some re-entry reflection meetings to help students process their experience.

Pre-departure preparation requirements: Meet with the Director of the GEI to discuss site visit plans, data collection requirements, travel expenses, and expense records.

Site Visits

Prospective program leaders are required to make a site visit prior to proposing a new FLP. Site Visit proposals must be reviewed and approved by the Faculty-Led Advisory Committee (FLAC). CIES will provide a site-visit grant up to \$2,000, the amount of the grant will be determined by the FLAC when reviewing the Site-Visit Grant Application included in the Site Visit Proposal Packet. There is an expectation that the college and department of the faculty member proposing an FLP will contribute monies for the site visit.

During the site visit program leaders investigate:

Classroom activities that focus on the learning goals of the department and the proposed academic course; Opportunities for cross-cultural learning--focusing on true interaction with people from the local culture (not just with local guides); Activities; Classroom Space; Lodging; Transportation; Health and safety issues/mitigation; Probable cost to students; Environmental, social, economic impact on the site; and general program viability

The site visit

A successful site visit is the result of good advance planning and contacts. In some cases, it will make sense to make arrangements through local travel companies or working with your third-party program provider who can get discounts and can easily arrange for group meals, transportation, etc. When defining costs associated with programmatic elements, please provide a reasonable range to allow for adjustments when developing the FLP budget. Additionally, we ask that you keep the students in mind and locate options for the students and for yourself that will not be cost prohibitive, as participation in an FLP can be an added expense for students with limited financial resources.

The checklist

The checklist below is meant to help guide your site visit and site preparations. You will be required to submit this document within three to four weeks of your return. The safety and security portion of this document will be included in the subsequent program proposal.

Please read this entire document BEFORE you go on your site visit!

Before you go (checklist):

- | | |
|--|--|
| | 1. Prepare list of contact information for people you plan to meet (tour operators, guides, drivers, transportation reps, medical reps, US Embassy contacts, etc). |
| | 2. Make a basic itinerary for your site visit to ensure you don't forget critical elements and use time efficiently. |
| | 3. Make a draft itinerary for the FLP you are proposing. This will help you organize and refine your plans while on site. |
| | 4. What is the cost of your airfare? Cost: |
| | 5. Read SJSU's financial travel policy, as well as the GEI's financial travel policy manual. Decide to take a cash advance or request reimbursement for your expenses after traveling. Make money plans. Will you use an ATM, carry traveler's checks, use your credit card, carry some cash? Please track your expenses while you travel to assist you in tracking your budget. |
| | 6. Be sure you have your health insurance card and know what to do in case of illness, injury or emergency. Check the State Department (http://www.state.gov/travel/) and CDC (http://wwwnc.cdc.gov/travel) websites to keep current on any safety issues in the host country. |
| | 7. What type of visa is required for your visit and for the program? How is it obtained? Is there a fee associated with obtaining a visa? How will students obtain visas when the FLP runs? |

During the site visit:

Learning: Explore learning opportunities (meet with potential lecturers, visit museums, natural sites, other classroom and cultural opportunities). Be sure to write down any costs and complete contact information for each person, location, and vendor (e.g. cost of lecturers, cost for using tour operators, museum admission for students/faculty, admission fees for other points of interest, etc.)

Lecturers/museums/other	Contact Name	Landline/Cell	Email	Address	Cost

Guides: Note all details for guides that may be utilized. Talk to local contacts, travel companies, etc. to identify good guides.

Guides	Location	Dates	Company name	Contact Name	Landline/Cell	E-mail	Cost

Lodging: Visit multiple potential lodging venues at each location and stay overnight where possible. Answer the following questions:

	YES	NO
Does the venue have any history of robbery or other petty crimes? (Ask the hotel staff)	<input type="checkbox"/>	<input type="checkbox"/>
Notes:		
Are there seedy bars, prostitutes, other security concerns nearby?	<input type="checkbox"/>	<input type="checkbox"/>
Notes:		
Go out at night when students are likely to be coming back...do you notice any security concerns?	<input type="checkbox"/>	<input type="checkbox"/>
Notes:		
Is there a safe for money, passports, etc.?	<input type="checkbox"/>	<input type="checkbox"/>
Notes:		

Does it have kitchen facilities?								<input type="checkbox"/>	<input type="checkbox"/>
Notes:									
Does it have a classroom type space?								<input type="checkbox"/>	<input type="checkbox"/>
Cost?		<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Notes:									
Is it in a convenient location for using public transportation?								<input type="checkbox"/>	<input type="checkbox"/>
Notes:									
Is it reasonably priced?								<input type="checkbox"/>	<input type="checkbox"/>
Notes:									
Does the venue present opportunities for cross-cultural experience?								<input type="checkbox"/>	<input type="checkbox"/>
Notes:									
Lodging Name	Contact Name	Cell/ Landline	Email	Payment method (invoice, CC, Cash)	Address	Ave. Cost	Occupancy (Single/Shared 2-3)		
Please elaborate on any security concerns with the above lodging sites:									

Please assess language(s) of the area.

a) Is it critical to know the local language?

b) How fluent are the locals in speaking/understanding English vs. their native language?

c) Are there Key phrases visitors should know to better navigate the area? If so, what are some of those phrase?

Access for Students with Disabilities: Every culture approaches disabilities differently. Some countries have more accommodations than others. As we do not discriminate when selecting participants for our programs, it is important to investigate what challenges our students with disabilities may face on a FLP.

What is the general cultural response to persons with disabilities?
Notes:

	Yes	No
Can a student who uses a wheelchair expect to get around reasonably well?	<input type="checkbox"/>	<input type="checkbox"/>
Notes:		
Are sign language interpreters available for the hearing impaired and is assistance available for students who are visually or physically impaired?	<input type="checkbox"/>	<input type="checkbox"/>
Notes:		
Given the nature of your program, what reasonable accommodations can be made for students with physical challenges, learning disabilities, or dietary limitations/restrictions (food allergies, gluten intolerance, vegetarian diets, etc.)?	<input type="checkbox"/>	<input type="checkbox"/>
Notes:		

Classroom space: if the lodging venue does not have a classroom space, use local contacts to find one.

Potential classroom	Contact Name	Cell/Landline	Email	Address	Cost

3rd Party Contact Information on site (if applicable): Often times using 3rd party providers can save money and effort in designing FLPs. It is a good idea to at least explore the possibilities of using 3rd party providers. Ask the GEI for assistance in identifying a 3rd Party Provider.

Organization/Company Name	Contact Name	Cell/Landline	Email	Address

Transportation: Note the details here for each major type of transportation you intend to use. The details will be especially critical in any kind of emergency. Please look for \$ saving opportunities like multi-day passes for public transportation. Please use "insert rows" to add lines as you need them.

Transportation	Company name	Contact Name	Cell	Landline	E-mail	Website	Itinerary to/from	Date	Time	Cost
To Airport										
From Airport										
Bus between cities or for longer rides										
Train										
Ferry										
Driver										
Public transport passes										

Transportation hubs: This information is included so that if Program Leaders are incapacitated in some way, people at SJSU have this information and can direct students accordingly. Please include only major transportation hubs (train, bus, subway) near longer term lodging sites. This is particularly important for any remote lodging sites.

Transportation Hubs (near lodging sites)	Address
1	
2	
3	
4	

Food: It is best to try out all restaurants where you plan to have group meals as well as places you may recommend to students. Please note costs at all restaurants/street food/etc.

Group meal restaurant name	Address	Contact Name	Call Landline	Email	Payment Method (CC or Cash)	Are reservations taken?	Cost per person

Safety and Security: The following are critical pieces of information for emergencies. If you need help with contacts, please ask the Global Education and Initiatives Office. You will be required to register each group with the relevant US Embassy(ies) before each trip through the State Department's STEP program. This information will become the foundation for your emergency action plan.

What is the local equivalent of 911?

US Embassy (Country)	Contact Name	Cell	Landline	E-mail	Address
1					
2					

Hospital Name (closest to lodging sites)	Contact name	Phone	E-mail	Address
1				
2				
3				
4				

Doctor: Identify a doctor for any location where the group will stay more than a few days. This information will be available through GEI and our insurance provider for FLPs.

Doctor Name	Cell	Landline	Address

Police: If possible, stop by the local police station in each location where the group will stay. Make a contact and ask about crime in the area and for any warnings for students (e.g. carry a money belt, be back before X time, etc.) A good police contact will help keep an eye out for students while they are in residence.

Police Station Name (closest to lodging sites)	Contact Name	Address	Cell	Landline	Website	Email
1						
2						
3						

		Cost:			
Average cost of <u>lunch</u> at low or average priced restaurant:					
Average cost of <u>dinner</u> at low or average priced restaurant:					
				Cost	
Groceries: visit a grocery store and get a sense of prices...is it 10% more expensive than CA, less, about the same? This is to give students an idea of costs if they cook their own meals when kitchens are available					
Money: Identify ATMs that are convenient to lodging locations. In some countries, vendors may initially refuse to use an American credit card. They will state they do not have the ability to run it. This is not true. One way to politely force them to use the American credit card is to simply state that is the only way you can pay. Be prepared to tell your students about how to deal with money/credit cards on your trip					
International student recruiting: Please keep in mind that every time you are in an international setting, it presents an opportunity to recruit international students for SJSU. Please be sure to speak with the International Student Recruiters prior to your site visit to collect information about potential contacts and opportunities for recruiting.					
School/Agency Name	Contact Name	Cell	Landline	E-mail	Address
Partnership Opportunities: If you do meet or partner with an institution for your program, with what other U.S. institutions does this university/college have agreements that involve U.S. students? Do you sense that an agreement with SJSU would be one that is valued?					
School/Agency Name	Contact Name	Cell Landline	E-mail	Address	
Alumni: There may be great opportunities to connect with alumni wherever you are visiting. Alumni may suggest events for students, invite them to visit their offices, etc. Please contact the Alumni office for information about potential alumni to meet while on your site visit.					
Alumni Name	Cell Landline	Email	Address		

Safety and Security: The following are critical pieces of information for emergencies. If you need help with contacts, please ask the Global Education and Initiatives Office. You will be required to register each group with the relevant US Embassy(ies) before each trip through the State Department's STEP program. This information will become the foundation for your emergency action plan.

What is the local equivalent of 911?

US Embassy (Country)	Contact Name	Cell	Landline	E-mail	Address
1					
2					

Hospital Name (closest to lodging sites)	Contact name	Phone	E-mail	Address
1				
2				
3				
4				

Doctor: Identify a doctor for any location where the group will stay more than a few days. This information will be available through GEI and our insurance provider for FLPs.

Doctor Name	Cell	Landline	Address

Police: If possible, stop by the local police station in each location where the group will stay. Make a contact and ask about crime in the area and for any warnings for students (e.g. carry a money belt, be back before X time, etc.) A good police contact will help keep an eye out for students while they are in residence.

Police Station Name (closest to lodging sites)	Contact Name	Address	Cell	Landline	Website	Email
1						
2						
3						

Disaster meeting points: For each location where you are staying for 3 days or more, please identify two gathering places other than your lodging site. Figure out a reasonable perimeter and pick 2 sites (restaurant, café, library, any major building) that are likely to be accessible. The purpose is to have an established gathering place so that if members of the group are off on their own and something happens (earthquake, fire, bomb, demonstration, etc.), they know to go to a particular gathering site. These sites will be part of your emergency action plan.

Disaster Meeting Points (2 per lodging site)	Emergency contact name	Emergency contact cell	Emergency contact landline
1			
2			
1			
2			
1			
2			
1			
2			

Other: Ask local contacts: Any health concerns/issues for this particular area? How do ambulances work in these areas? Who pays? Where would an injured person be taken, etc...

Safety, security and health notes:

Other things to consider:

Do you see lots of American students in the areas you have selected?

Notes:

What would you describe as the most unique opportunities for course work and cross-cultural engagement in the areas you have selected?

Notes:

What do you consider to be the program's environmental, social and economic impact on the local communities?

Notes:

Itinerary refinement: some additional things to consider...

Have you planned adequate time between activities? Remember, usually things take longer than you might expect! More travel doesn't always mean a better experience. The longer the group can stay in a fixed location, the higher the likelihood students can engage with the host culture in a meaningful way.

Have you programmed in specific time for individual and group reflection/processing?

Have you programmed down time for both students and Program Leaders? FLPs are **not** the typical 9am-5pm scheduled day. Faculty leading an FLP need to consider they are on-call at all hours when running an FLP. You do not need to have evening activities planned for every evening, but it can be a nice way to share a cultural experience with your students and help with group dynamics. We expect that faculty will stay in the same accommodations as students when possible. If it is not possible to stay in the same accommodations (if students were to stay in a residence hall with a partner institution and faculty cannot secure their own room) we do expect for the faculty to locate accommodations very nearby the students' accommodations. We also do not allow students to travel independently during a scheduled FLP, this includes weekends.


Do you have back-up plans in case activities/transportation/lodging fall through?

Do you have alternative contacts for activities, meals, lodging, transportation, guides, etc. should anything fall through or if weather prohibits your original plan? Have you considered the financial implications that may arise with those alternative options? How will you budget for those increased costs?

Notes:

Appendix Z.4 - Class Section Add Forms

Save Form
Print Form



Special Session
COLLEGE OF INTERNATIONAL AND EXTENDED STUDIES

Class Section Add Form

Submit this completed form to the College of International and Extended Studies (CIES), Extended Zip 0135 or Fax: 408.924.2666. Upon completion, the form will be returned by email or fax with the assigned class and section number. A **Special Session Instruction Appointment Form** must be submitted to Faculty Affairs to meet hiring requirements.

Term: Spring Summer Fall Year: _____

College: _____ Department: _____

Requestor Name: _____ Requestor Email: _____

Requestor Phone: _____ Requestor Fax: _____

Subject Area: _____ Catalog Number: _____

Class Title: _____ Units: _____

Special Program: _____ or Supervision Class or Advising Class: _____

Tuition/ Administrative (check one) Fee Per Unit: \$ _____ Flat Fee: \$ _____

**You must enter the exact Class Start/End Dates, Meeting Start/End Times and days for class meetings. For "WW" Instruction Mode, TBA will apply. Indicate additional scheduling details in the "Notes" section below.*

Maximum Enrollment: _____ Class Start Date: _____ Class End Date: _____

Days of Week: U M T W R F S Meeting Start Time: _____ Meeting End Time: _____

Department Consent: Y N Instruction Mode: Print Class in Schedule: Y N

On Campus: Y N if Yes - Room Needed: Y N Off Campus: Y N if Yes - Location: _____

** For Faculty-Led Programs (FLP) ONLY, indicate the class(es) and number of unit(s) each student will enroll in:*

Course (e.g. BIOL 101): _____	Course: _____	Course: _____
Units (e.g. 3, 4): _____	Units: _____	Units: _____

Tuition Per Unit: \$ _____ Administrative Flat Fee: \$ _____ Program Fee: \$ _____

**Note any special instructions for this course (including salary agreements):*

Instructor's Employee ID Number: _____
 (Instructor MUST have existing Employee ID Number with HR in order to assign to a section)

Instructor's Name	Instructor's Signature	Date
_____	_____	_____
Instructor's Name	Instructor's Signature	Date
_____	_____	_____
Dept. Chair/ Program Director's Name	Dept. Chair/ Program Director's Signature	Date
_____	_____	_____
College Dean/ Designee's Name	College Dean / Designee's Signature	Date
_____	_____	_____

FOR CIES OFFICE USE ONLY

Associate Dean's Signature of Approval: _____ Date: _____

Processed By: _____ Class Number: _____ Section: _____

Units: _____ F: _____ D: _____ U: _____ Fee Type: _____ Term Code: _____

210 N.4th Street, Suite 301, San José, CA 95112
Tel 408-924-2670 | Fax 408-924-2666
Email cies@sjsu.edu | Web www.sjsu.edu/~prlp

1 | 1 Page
Version 4.15.15

Appendix Z.5 - Student Application Questions

ESSAY QUESTIONS TO ASK

1. Why do you think you are a good candidate for this FLP program?
2. What do you hope to learn through your participation in this FLP program?
3. What do you think you have to offer to this program?
4. In what way would your presence benefit those with whom you will study and travel?
5. Describe a situation where you were confronted with something radically unfamiliar to you- for example, a strange food, a different cultural practice, or a religious ritual you didn't know the rules for. How did you handle it? How did you feel about the way you handled this situation in retrospect? (50-100 words)
6. FLP programs require participants to exercise restraint in using smartphones. Participants will not be able to use phones during class meetings, group activities or group meals. By applying for acceptance to a FLP program, you indicate that you understand and agree to abide by this policy. What do you think might be challenging for you about this requirement?
7. You will be required to attend every lecture, field trip and event, which due to scheduling issues, may include several long days in a row. Do you feel that you will be able actively participate in all activities?
8. Traveling doesn't always go as planned. Being comfortable with ambiguity and flexible enough to go with the flow are incredibly important skills not only for traveling, but in life. Please describe your level of comfort with changes in schedules and adapting to circumstances beyond your control.
9. Describe your intended consumption of alcohol while on your FLP.
10. Lodging for a FLP program can vary. You could be asked to stay in a hostel, hotel, apartment, or homestay. Lodging is usually quite modest and will not likely be in a 4-5 star accommodation. You will likely be asked to share accommodations with another participant whom you may or may not know. Please evaluate your ability to share a modest living space with someone you may not be friends with, under the circumstances described above.
11. FLP programs often involve quite a bit of walking from one activity/location to another, moderately strenuous physical activity, activities that take place in weather you may not be accustomed to (rain, full sun, humidity, etc.), and it is not uncommon to visit architectural sites and monuments that are in very old buildings with no elevators and narrow stairways, in some cases, very steep stairways. Please evaluate your level of readiness for such physical activity.

FLP Application

How to view an FLP application as
a Reviewer in Terra Dotta

Logging In

- Go to ***https://goabroad.sjsu.edu***
- Click on Non-SJSU Login/Register to log in. All program leaders were added into the system by their email address, not by their SJSU ID. If you log in using your SJSU ID and password, you will not be able to view the applications you received for the program.

https://goabroad.sjsu.edu

HOME | PROGRAMS | STAFF | DEADLINES | **NON-SJSU LOGIN/REGISTER** | LOGIN/REGISTER

Study Abroad Homepage
Programs
Finances & Scholarships
Resources
Student Involvement
Information for Faculty
Incoming J-1 Exchange Students

ANNOUNCEMENTS
There are no announcements

We offer a range of Study Abroad programs on a semester and academic year basis. Our programs are held in conjunction with over 250 universities in 55 different countries. You can find the program that is right for you by searching by region, program type, or major.

Study Abroad Office
Clark Hall, Room 552
Tel: (408) 924-5931
Fax: (408) 924-5976
studyabroad@sjsu.edu
Last modified 02/24/2015
Top of page

Drop-in Hours:
Tuesday-Friday
11am-1pm and 3pm-4pm
and by appointment

Mailing Address:
International Student & Scholar Services
San José State University
1 Washington Square
San José, CA 95192-0221 U.S.A;

Security > Login (existing user)

Security : Login (existing user) Hide Tips

To login, please enter your username and password in the form provided below.

Please log in:

Username:

Password:

[Forgot your password?](#)

New Administrative User:
If you are a new admin user of this site and require assistance logging in, click the link below which describes the type of user

The Terra Dotta system will send you an email with your password to log in. Use your email address (what GEI has on file – typically your SJSU email unless otherwise noted on your proposal) and the password provided to log in.

Portal ▶ Home

Portal : Home

Below are several administrative areas that allow you to manage your programs, applications, applicants, as well as site and system settings.

My Queries & Reports

My Reviews

Reviews For: Japanese Intensive Language Study
Study Abroad in Japan Scholarship
AsiaLearn and Korea University, South Korea

You are currently filtering on applicants for Fall, 2011; Spring, 2011; Fall, 2010; Spring, 2010, excluding withdrawn applications.

Filter Options

Progress Audit: - Select Phase -

Japanese Intensive Language Study

Fall, 2010	Date Started	Status
Aymes, Janice (ID: 11104)	08/09/2010	Current Status: Committed You recommend: REJECT Review submitted: 08/09/2010

My Notes

No notes found

Enter new note and date here.

8 / 9 / 2010 Add

Once you are logged in, you should see a similar view to this.

My Reviews

Reviews For: Japanese Intensive Study Abroad in Japan Scholarship
AsiaLearn and Korea University, South Korea

You are currently filtering on applicants for Fall, 2011; Spring, 2011; Fall, 2010; Spring, 2010, excluding withdrawn applications.

Filter Options

Progress Audit: - Select Phase -

Japanese Intensive Language Study

Fall, 2010	Date Started	Status
Aymes, Janice (ID: 11104)	08/09/2010	Current Status: Committed You recommend: REJECT Review submitted: 08/09/2010
Morse, Edward (ID: 11105)	08/09/2010	Current Status: Committed You recommend: WAITLIST Review submitted: 08/09/2010
Bitter, Pamela (ID: 11106)	08/09/2010	Current Status: Committed You recommend: ACCEPT Review submitted: 08/09/2010
Spring, 2010	Date Started	Status
Baldwin, Jason (ID: 10911)	03/24/2009	Current Status: Committed You recommend: ACCEPT Review submitted: 08/09/2010
Kim, Yoking (ID: 10913)	03/24/2009	Current Status: Committed You recommend: ACCEPT Review submitted: 08/09/2010
Rosenburg, Samuel (ID: 10915)	03/24/2009	Current Status: Committed You recommend: ACCEPT Review submitted: 08/09/2010

To view an application for your program, you can click on the student's name. The Date column is the date that the student submits the application. In the Status column, when it shows Ready for Review you can begin reviewing the application. Please remember, do not tell students your decisions. Our office will send the official notification emails.

Once you are in the student's application, you will be able to see the student's personal information and their answers to the short-response questions.

Logout | Admin

Administration ▶ Reviewers ▶ Review: Bryan M King

King, Bryan M.
 Japanese Intensive Language Study (Tokyo)
 Fall, 2011
 Status: Pending
 Outgoing Applicant

Created: 08/08/2010 (by Applicant)
 Last Updated: 08/09/2010 @ 05:16:32 AM
 Last Viewed by Applicant: 08/23/2010
 ID# 11101:no label

Applicant Information	
Gender:	M
Date of Birth:	05/22/1987
Confidentiality Flag:	
Email Address:	bking@studioabroad.com
SMS Email Address:	
CC Email Address:	

Custom Parameters	
Financial aid student?	No
US Citizenship?	Yes
Student Level:	Junior

Short Response Questions

(some questions are shortened here - see application for full wording of the questions)

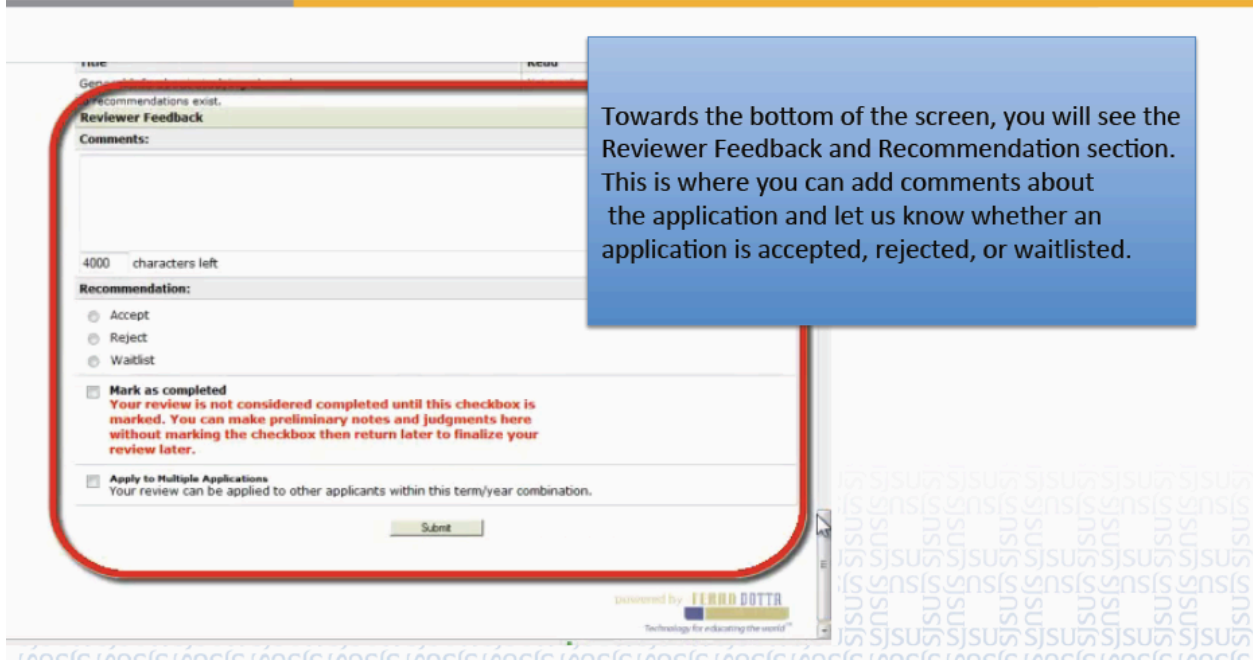
- Why do you think you are a good candidate for this FLP?
- What do you hope to learn through your participation in this FLP?
- What do you think you have to offer to this program?
- Describe a situation where you were confronted with something radically unfamiliar to you?

Short Response Questions (cont.)

- Do you feel that you will be able to actively participate in all activities? If no, please explain.
- Describe your intended consumption of alcohol while on your FLP.
- FLPs require participants to exercise restraint in using smartphones. Participants will not be able to use phones during class meetings, group activities or group meals. What do you think might be challenging for you about this requirement?
- Traveling doesn't always go as planned. Please describe your level of comfort with changes in schedules and adapting to circumstances beyond your control.

Short Response Questions (cont.)

- Lodging for a FLP program can vary. Please evaluate your ability to share a modest living space with someone you may not be friends with, under the circumstances described.
- Please evaluate your level of readiness for the following physical activity scenarios.



Reviewer Feedback and Recommendation

Reviewer Feedback:

For any application that is rejected, please add a brief comment in this section to note why the application is rejected. For any application that is accepted or waitlisted, the feedback section is optional.

Recommendation:

Please note that once you assign a status to the application, GEI will base on this and notify the student of their application status.

IMPORTANT! Please make sure to check off the box “Mark as Completed” before hitting the Submit button. If you do not check this box off, the review will be considered incomplete and a status will not be assigned to the application.

Next Step...

GEI will send out the official acceptance letters to students May 12th-15th.

The official acceptance letter will provide instructions for signing the Commitment form and submitting the prepayment.

Questions?

If you have questions about the reviewing process, please contact us at facultyledprograms@sjsu.edu.

Appendix Z.7 - Insurance and Policy Information for Participants (as of 6/1/22)

GLOBAL ASSISTANCE & INSURANCE PROGRAM

San Jose State University





Welcome to On Call International! This plan provides the services and benefits you need to prepare for your destination as well as to help you with any problems you encounter while you are traveling or on assignment.

Before you depart...

- Contact On Call with any pre-travel health or security questions
- Closely review your [full plan description](#)
- Save On Call Contact information in your mobile phone (check out the last page!)

While abroad... You can contact the On Call International 24/7 Global Response Center from anywhere in the world to reach an assistance coordinator who is ready to help you with your crisis, no matter how big or small.

PLAN ID CARD:

 <p>GLOBAL ASSISTANCE & INSURANCE PROGRAM</p>	<p>Organization Name San Jose State University</p> <p>Policy Number 22INT06941</p> <p>Plan Type Medical, Travel and Security Assistance International Medical Expenses</p>	<p>If you need Medical, Security or Travel assistance, regardless of the nature or severity of your situation, contact On Call 24 hours a day:</p> <p>Call collect from anywhere in the world: +1 603-952-2688 Call toll free from US or Canada: 1-833-425-5103 24/7 Live Chat: www.oncallinternational.com/chat/direct</p> <p>Email: mail@oncallinternational.com Text only number: 603-945-0103 24/7 Live Chat: www.oncallinternational.com/chat/direct</p> <p>Global Assistance Services involving transportation must be paid and arranged by On Call; no claims for reimbursement of transportation will be considered. See your Plan Description for full terms and Conditions of the services and benefits offered in your plan.</p> <p>On Call International 11 Manor Parkway Salem, NH 03079, USA A member of the Takia Marine HCC group of companies</p>
		

OTHER PLAN CONTACTS AND RESOURCES:

<p>Customer Service - Benefit Questions M-F 9:00 am – 5:00 pm</p>	<p>Call toll free from US or Canada: 833-425-5103 Email: Contact@oncallinternational.com</p>
<p>Claims - self-paid medical or travel insurance reimbursements</p>	<p>tpaclaims@oncallinternational.com</p>
<p>Plan Information Portal – plan documents; contact and claim forms; pre-trip preparation resources</p>	<p>www.myoncallportal.com Portal Group ID: 100086CPPD18</p>

GCM0118-2

www.oncallinternational.com



How can On Call International help?

Contact the Global Response Center if you experience a medical, personal, travel or safety problem or crisis. Your institution has partnered with On Call to provide access to immediate support should you experience any challenges when you are traveling. On Call provides you with a resource experienced in navigating through any crisis and making sure you can continue your trip, or get home safely. On Call assists during critical emergencies such as illness or injury that may require an evacuation or during a political or natural disaster event that may threaten your safety. On Call also assists with smaller problems you may not realize you have a resource for. Review a summary of services on the following pages.

If you are, or will be, hospitalized following an accident or illness that occurs while traveling, contact the On Call Global Response Center as soon as possible. On Call will facilitate payment of your medical expenses whenever possible. In the event the medical facility you are in is not adequate to treat you, On Call will arrange for your medically supervised evacuation to the closest appropriate facility.

If you need an outpatient or physician appointment for an accident or illness, you can contact the On Call Global Response Center to make an appointment and arrange payment of your medical expenses prior to your visit whenever possible, this means no out of pocket expenses for you. There is no specific network, so if you choose to make your own appointment and self-pay the medical expenses, you can submit a claim for reimbursement consideration.

In the event of a political or natural disaster event which threatens your safety, contact On Call immediately. You will be connected to a security professional who can provide immediate advice to maintain safety and then assess your situation to determine appropriate next steps.

Helpful Information

- ✓ If you have access to a landline, ask the operator to connect you to On Call and reverse the charges; On Call accepts all collect calls.
- ✓ If you are utilizing a mobile phone and have any issues making an outgoing international call, you can email or text the Global Response Center as an alternative to request assistance, or a return call.
- ✓ Contact On Call for payment and arrangement of all Services that involve transportation arrangements, these services are not reimbursable if you make your own arrangements/self-pay prior to notifying On Call.
- ✓ On Call is not a first responder. If you are in a true emergency and need help getting to a medical facility, dial the country's equivalent to 9-1-1 to get local response.



SERVICES AND BENEFITS

Full terms, conditions and exclusions to coverage apply; review the full plan description carefully.

BENEFITS	LIMITS PER INSURED PERSON
Medical Evacuation and Repatriation	\$250,000
Repatriation of Remains or Burial	\$50,000
Security Evacuation	\$100,000 for evacuation
Emergency Travel Expenses (Reunion)	\$12,500 when in hospital for more than 3 days
Medical Expenses and Hospitalisation	\$250,000
Deductible: All Cause	0
Co-Insurance	100%
Acute Onset of Pre-existing condition Clause	Up to a maximum of \$15,000 per lifetime
Emergency Pain Relieving Dental Treatment	100% of customary charges up to \$3,000 for accidental injury and \$500 for pain relief
Prescribed Medicines by a Doctor or Specialist	Maximum of 60 days per subscription
Maternity	Up to the medical maximum up to 26 weeks of pregnancy
Outpatient Treatment by a Doctor or Specialist	100 % of Customary Charges
Alcoholism or substance abuse treatment	Up to \$10,000
Treatment by Physiotherapists and Chiropractors as Prescribed by an Authorized Physician	100% of customary charges if in connection with covered injury/illness
Ambulance Transportation	100% of customary charges if in connection with covered injury/illness
Mental Health	Up to a maximum of \$20,000
Personal Accident - Accidental Death, Loss Of Sight, Loss Of Limb(S), Permanent Total Disablement	\$10,000
Personal Liability Physical injury and property damage	\$100,000
Emergency Bail Bond	\$1,500
Catastrophe Coverage	100% of customary costs up to \$1,000
Search and Rescue	100% of customary costs up to \$10,000
Loss Of Personal Belongings – Including Theft and Loss or Damage by Fire or Natural Disaster	Up to \$1,000, \$100 maximum per article
Loss of Checked in Luggage	\$500
Luggage Delay	\$200
Lost Documents, Equipment or Money	\$200
Trip Interruption	\$2,500
Travel Delay	\$100 a day; Max 5 days

ENHANCED BENEFITS

BENEFITS	LIMITS PER INSURED PERSON
Bereavement Reunion	\$5,000
Return Home due to Felonious Assault	\$5,000
Emergency Travel Expenses due to Felonious Assault	\$5,000
Return of Dependent Children	\$5,000



On Call International
 11 Manor Parkway
 Salem, NH 03079, USA

A member of the **Tokio Marine HCC** group of companies

Hazardous Activities	\$20,000
Adventure Activities and Sports	\$20,000
Pre-Trip Cancellation	\$1,000
Continuing Medical Charges	\$30,000 or 30 days
Program Fee Refund (Students Only)	\$1,000
Quarantine	Up to \$5,000 combined single limit (CSL) annual aggregate per insured person/traveler: -Return of travel companion: Up to \$1,500 included under CSL -Hotel Stay: Up to 14 days or \$2,500 included under CSL -Food Costs: Up to \$50 per day for 14 days included under CSL -Change Fee/Airfare: Up to \$1,000 included under CSL

ADDITIONAL MEDICAL, TRAVEL AND SECURITY ASSISTANCE

You also have access to the following assistance services; there are no monetary benefits associated with these services:

MEDICAL ASSISTANCE	TRAVEL & SECURITY ASSISTANCE
Pre-Trip Planning	Pre-Trip Information & Active Travel Advice
Medical , Dental and Pharmacy Referrals	Translator and Interpreter Assistance
Medical Monitoring	Emergency Travel Funds Assistance
24 Hour Nurse Help Line	Legal Consultation and Referral
Dispatch of Medicine	Lost/Stolen Document Replacement
Coordination of Benefits	Emergency Message Forwarding

This is a brief summary of coverage for insured participants covered under Policy Number 22INT06941. This is not a contract of insurance. Coverage is governed by an insurance policy issued to San Jose State University. The policy is underwritten by HDI Global Specialty SE, UK Branch. Complete information on the insurance is contained in the Certificate of Insurance on file with San Jose State University. If there is a difference between this program description and the certificate wording, the certificate controls.

HOW TO ACCESS MEDICAL CARE ABROAD

Health insurance for international travel is not accepted by international medical facilities by presenting your plan card as you typically experience in the US. Most facilities require financial arrangements to be made at the time care is received for international travelers. On Call provides assistance with this and can be contacted any time medical care is needed.

When you contact On Call, an assistance coordinator will collect some information to create a case record for you and then will proceed with the needed assistance. On Call attempts facilitation of



medical expenses by placing a Guarantee of Payment (GOP) with the provider for your appointment or hospital visit. A GOP is simply a letter sent by On Call International via email or fax to a medical facility that informs the medical facility of your coverage dates and insurance benefits. The letter asks the facility to send your medical bills directly to On Call or to On Call's local partners for payment. Here is some information about your options when seeking medical care abroad and how they work:

EMERGENCY MEDICAL CARE – *You need immediate medical attention for a potentially life threatening injury or illness.*

- In an emergency, you should proceed directly to the closest hospital and you or a companion can contact On Call when it is safe to do so.
- Use the local equivalent to 9-1-1 if first responders are needed.

URGENT MEDICAL CARE - *You need to seek care as soon as possible for a condition that needs prompt attention but is not life-threatening.*

- Contact On Call via phone, text or email and an Assistance Coordinator will open a case for you to begin assistance
- On Call will provide you information for the closest preferred urgent care clinic or emergency room in case you need to proceed there immediately. This will be provided on the call, or shortly after
- On Call will contact that facility to advise them you are coming and request to place a guarantee of payment for your visit
- When the GOP is confirmed, On Call will update you.
- Timing of GOP's cannot be guaranteed as they can be impacted by a number of factors. If you have any problems upon arrival to the medical facility you should contact On Call or provide our phone number and your case number to the medical facility and ask them to call to confirm the GOP.

NON-URGENT CARE - *You would like a scheduled appointment with a physician or specialist and do not require treatment within the next 24 hours.*

- Contact On Call via phone, text or email and an Assistance Coordinator will open a case for you to begin assistance
- On Call will locate an appropriate provider that accepts a GOP and check your availability for a preferred appointment time.

ANY-TIME OPTION FOR OUTPATIENT OR A PHYSICIAN'S CARE – *You prefer to make your own arrangements and are prepared to pay out of pocket.*

- This does not impact your coverage, there is no in / out of network
- Retain all receipts and medical reports
- Complete a claim form



- Submit completed claim form, receipts and any medical documentation to On Call International for consideration of reimbursement
- Email to tpaclaims@oncallinternational.com
- The exception is for inpatient expenses. Inpatient medical expenses should be pre-certified by On Call; however, if you are unable to contact On Call while you are hospitalized and you self-pay your inpatient medical expenses, you can submit a claim for reimbursement of covered expenses. Along with your completed claim form, an explanation of the emergency and what prevented you from notifying On Call should be included.

IMPORTANT

It is important to note that while On Call will always attempt a referral to a facility that accepts a guarantee of payment, ultimately whether they are willing to take it or not is up to them and this can change at any time. If a GOP is declined, as a secondary measure On Call will attempt payment with a credit card over the phone or a wire transfer however not all facilities will allow this. For this reason, as part of your pre-trip preparation for international travel, it is important you try to prepare to pay out of pocket for urgent medical care, or to place a deposit for a hospitalization in an emergency. While On Call will make every effort to avoid this, it always remains a possibility when traveling internationally.

Additionally, if you have a pre-existing medical condition that may require specialty care, or are taking prescriptions, contact On Call when planning your trip to be sure the medical resources you may need are available in your destination.

ADDING ON CALL TO YOUR PHONE CONTACTS

Did you know that some smart phone operating systems are now automatically sending any calls from numbers they don't recognize to voicemail without any notification to the user? This is to reduce spam calls for their customers, but it could have a negative effect when you are trying to get help abroad. So take a moment to complete this simple pre-trip step to ensure you are best prepared for your international travel.

How To: Most smartphone have a QR scanner in the phone – just open your camera and point it at the code. If you do not have a scanner, simply [CLICK HERE](#).

This will give you a link to download a digital contact card pre-loaded with On Call's detailed contact and plan information. This is not an app - it will simply add a pre-loaded contact in your phone's native contact app. Taking this step not only ensures that you'll have On Call info should you need it, but also that you will recognize when On Call is contacting you.



Appendix Z.8 - FLP Program Leader Agreement & Approval Forms

Faculty-Led Program (FLP) Program Leader Agreement & Approval

This Memorandum of Understanding is entered into by San José State University's College of International and Extended Studies (CIES) and [redacted] hereafter referred to as the Program Leader, for the development of a faculty-led program will be participating in a CSU-affiliated study abroad program as follows:

Program Start Date: [redacted] Program End Date: [redacted]
Program Location: Country(ies) [redacted] City(ies) [redacted]
Course Number(s) and Title(s): [redacted]

General Conditions:

- Program Leader will adhere to the program policies and procedures set forth by the College of International and Extended Studies.
- Program must be self-supporting. It is the responsibility of the Program Leader to keep the program within budget. Program Revenue deficits must be covered by Program Leaders. **CIES is not responsible for program deficits.**
- Only costs specified in the approved Travel Authorization will be reimbursed.
- Program Leader will complete grade reports and submit budget expenses reconciliation to CIES Finance within thirty (30) days upon completion of the program.
- Re-entry and evaluation procedures must be completed within eight (8) weeks upon completion of the program.

Acceptance: I understand and accept the terms of this agreement.

Program Leader (Print Name): [redacted]

Signature: [redacted]

Date: [redacted]

Faculty-Led Program (FLP) Program Leader Agreement & Approval

Program Name: Program Leader(s):

Part I: Department Chair Approval

- I have read the faculty application and discussed the course offering with the faculty member.
- I certify that the course of study is within the faculty's field of competence.
- I agree that the student learning objectives for the course can be met within the travel study format, including appropriate pre- and post-trip meetings.
- I approve the offering of this course abroad.
- I understand and accept the terms of this agreement.

Department Chair's Signature Department Chair's Name Date

Part II: College Dean Approval

- I approve the offering of this course abroad.
- I understand and accept the terms of this agreement.

College Dean/Assoc. Dean's Signature College Dean/Assoc. Dean's Name Date

Part III: Director of Global Education and Initiatives (GEI) Approval

- I have reviewed the travel arrangements proposed for this study abroad course and find the arrangements to be appropriate. I have also discussed the requirements with the faculty member and have advised him/her of what must be followed when offering this course in another country.
- CIES acknowledges that the above program has been reviewed by the sponsoring College and Global Education and Initiatives staff and that the faculty member has been given FLP policies and procedures related to short-term study abroad courses. CIES will support this program as long as enrollments, other financial conditions, and related course costs are deemed appropriate. CIES reserves the right to modify arrangements, in consultation with the sponsoring College.

GEI Director's Signature GEI Director's Name Date



Appendix Z.9- Instruction Appointment - Special Session/Winter Session Form

SJSU SAN JOSÉ STATE UNIVERSITY

Print From Save Form

Special Session
COLLEGE OF INTERNATIONAL AND EXTENDED STUDIES

Instruction Appointment – Special Session/Winter Session Form
Form must be signed by: 1. Faculty; 2. Appointing Authority; 3. Dean or Designee before class begins.

Faculty Name: _____ Empl ID: _____

College: _____ School/Department: _____

Faculty Rank: _____ CIES Position No: _____

Special Session Program: _____ Semester (Term): _____

Projected Special Session Teaching Unit Total: _____

Projected Special Session Compensation: _____

Teaching Appointment (Paid)

Course(s) to be taught:

Title	Units
_____	_____
_____	_____

Volunteer Teaching Appointment**

Course Dates:

Begin	End
_____	_____
_____	_____

Non-Teaching Appointment (Paid)

DATES OF NON-TEACHING APPOINTMENT (one term per appointment) _____ - _____

SCOPE OF WORK (Attach additional pages, if necessary):

Please check the box next to any other appointments or compensation in addition to special session instruction that may constitute additional employment during this assignment?*

SJSU Faculty Assignments
 Special Consultant
 SJSU Research Foundation
 SJSU Tower Foundation

Other Extended Studies (CIES)

Examples of possible additional employment include SJSU Foundation grants and contracts; work at other CSU campuses, the CSU Chancellor's office, lottery awards, college and departments incentive grants or special project assignments

Volunteer Non-Teaching Appointment**

*I acknowledge this teaching assignment and to the best of my knowledge I am in compliance with the CSU additional employment policy.

Faculty Signature _____

College/School/Department Appointment Authority _____

College Dean/Designee _____

Date _____

Date _____

Date _____

Employment Allocation

1. SJSU	_____ %
2. Extended Studies	_____ %
3. Special Consultant	_____ %
4. SJSU Research Foundation	_____ %
5. SJSU Tower Foundation	_____ %
6. Total Allocation Time	_____ %

OVERLOAD REVIEW:

_____ Date _____

FACULTY AFFAIRS

_____ Date _____

EXTENDED STUDIES (IES)

***CSU ADDITIONAL EMPLOYMENT POLICY:** A faculty employee (Unit 3) is permitted additional employment compensated by the California State University, funded by General or Non-General Funds including CSU Auxiliaries. This additional employment shall not exceed 25% workload coverage.

****VOLUNTEER FACULTY (NO COMPENSATION):** Compensation is determined by California State University Salary Schedule "Instructional Faculty, Special Programs," class code 2322. Please note: "Section 3(e)(4)(A)(ii) of the FLSA does not permit an individual to perform hours of volunteer service for a public agency when such hours involve the same type of services which the individual is employed to perform for the same public agency." Reference: Department of Labor's Regulations 29 C.F.R. §553.102

210 North Street, Suite 301, San José, CA 95112
Tel: 408-924-2670 | Fax: 408-924-2666
E-mail: cies@sjsu.edu | Web: www.sjsu.edu/specialsession

1 | 1 Page
Version 7.6.15

Appendix Z.10 - Application for University Vehicle Operation/Authorization Budget and Risk Management



Application for University Vehicle Operation/Authorization Risk Management

Finance- One Washington Square- San José, CA 95192-0008

Main: 408-924-1558

Read and complete form, then sign, obtain supervisor/manager signature and authorization. Return form to [Risk Management](#)¹, Extended Zip 0008 or email to marla.perez@sjsu.edu. Keep a copy of the form for your department record.

Employees/Volunteers who operate motorized vehicles on university/state business are required to be safe drivers and operate vehicles in a safe manner. This is your request to operate vehicles on university business. You must have a supervisor's permission to operate any vehicle on university business. If your position requires that you operate vehicles on university business, then your continued employment will be contingent upon satisfying each of the following. In addition to the requirements below, if you will be using your privately owned vehicle on official university business, you are required to fill out an [Authorization to Use Privately Owned Vehicles on State Business \(STD_261\)](#)². Before operating a vehicle on university business, you must first provide evidence of, and certify and maintain, the following:

1. You possess and maintain a valid State driver's license (foreign licenses are not permitted). The driver's license must be appropriate for the job and vehicle(s) to be operated (e.g., class A, B, C).
2. You have not received more than three moving violations and/or accidents, or combination thereof, in the past twelve-month period.
3. You have completed a CSU-approved [Defensive Driving Course](#)³ (DDC). Frequent drivers should take the DDC every four years (SAM 0751).
4. You are enrolled in the university's Department of Motor Vehicles Employer Notice Program. Completing this form initiates that process. The DMV will provide the university with periodic updates of your driving record.
5. You have and maintain a good and safe driving record. Risk Management will review your initial driver's license motor vehicle record from the DMV. If you are a Class A, B, or Special Class C driver, you must provide (at your cost) an original DMV record at the time of hire.
6. If you are a volunteer and drive vehicles on official university business (e.g., field trips or athletic events), you are required to complete a [Volunteer Request Form](#)⁴.

I. Employee/Volunteer Information

Name: _____	Department: _____
Position: _____	Phone: _____ Email: _____
Employee ID or Student ID Number (on Tower Card): _____	
Driver's License Number: _____	State: _____ Expires: _____

II. Agreement, Certification, Release, and Acknowledgement

I understand and agree that I must possess and maintain a valid State driver's license in order to operate vehicles on university business. I am in possession of a valid California State driver's license, and I understand that if my job requires vehicle operation, my continued employment is contingent upon maintaining a valid driver's license. If at any time my driver's license becomes suspended or revoked, I will notify my supervisor/manager before operating any vehicles on university business.

I certify that the above is an <input type="checkbox"/> active employee <input type="checkbox"/> or a volunteer of SJSU.	
Employee/Volunteer Signature: _____	Date: _____
Approving Official Signature: _____	Date: _____
Approving Official Name (please print): _____	

¹ <https://www.sjsu.edu/fabs/services/risk/index.php>

² <https://www.documents.dgs.ca.gov/dgs/fmc/pdf/std261.pdf>

³ <https://www.sjsu.edu/fabs/services/risk/insurance/driving.php>

⁴ <https://www.sjsu.edu/up/uptoolkit/onboard/volunteers/index.php>

Appendix Z.11 - CSU Employment Questionnaire

CSU EMPLOYMENT QUESTIONNAIRE

CSU policy prohibits individuals from holding teaching assignments in the California State University (CSU) system that total more than the equivalent of one full-time position, unless the "overage" is funded from NON-General Fund sources or is the result of the accrual of part-time employment on more than one (1) campus. CSU employees with non-teaching assignments are, under certain circumstances, allowed additional employment up to 25 percent of a full-time appointment. These policies are strictly enforced by the State Controller's Office through which all payroll warrants are processed. In addition, for individuals who are neither a citizen or lawful permanent resident of the United States, your signature on this document certifies that you hold unrestricted work authorization with San Jose State University, as authorized by U.S. Department of Homeland Security regulations, for the 10-month period covering the academic calendar (or 5-month period covering a single semester calendar). Failure to satisfy this requirement may result in the termination of your faculty assignment. To avoid possible violations of these policies, and delays in receipt of payroll warrants, academically related employees are requested to provide the following information:

CSU SYSTEM EMPLOYMENT

Apart from San José State University, which other CSU campuses are you employed with this Academic Year?
List ALL that apply.

<u>CAMPUS</u>	<u>ASSIGNMENT</u>
<input type="checkbox"/> San Francisco State University	<u>Timebase/Fraction</u> (3 units = .20 FTE)
<input type="checkbox"/> CSU, East Bay (Hayward)	
<input type="checkbox"/> CSU, Monterey Bay	<u>Teaching/Non-Teaching Position</u>
<input type="checkbox"/> Other CSU Campus	

SAN JOSÉ STATE UNIVERSITY EMPLOYMENT

List ALL San José State University department/s which you work for or plan to work for during this Academic Year:

<u>Department</u>	<u>Timebase/Fraction</u> (3 units = .20 FTE)	<u>Teaching/Non-Teaching Position</u>
1:	1:	1:
2:	2:	2:
3:	3:	3:

Do you LIVE outside of the State of California? If yes, please provide State

During the contract period, are there any restrictions on your ability and/or availability to perform the essential functions of your job at SJSU with or without reasonable accommodations? YES NO

RETIREMENT SYSTEM

Are you a retired State of California employee (PERS or STRS)? YES NO Retirement Date:

By signing this form I agree that all the information provided above is true to the best of my knowledge.

Print Name

Signature Date

Academic Year: 13/14 14/15 15/16 16/17 17/18 18/19
Semester: Fall Winter Spring Summer

When you have completed this form, return it to your department office for inclusion in the Personnel Action File.

Rev 5/2013

San José State University
PAYEE DATA RECORD
 STD. 204 (12.07.12/ac) (REVERSE)

PURPOSE

Information contained in the Payee Data Record, STD. 204 will be used by state agencies to prepare information returns (Form 1099) and for withholding on payments to non-resident vendors. Prompt return of this fully completed form will prevent delays when processing payments.

Questions should be directed to:

San José State University	Phone: 408-924-1558
Accounts Payable Office	Fax: 408-924-1698
One Washington Square	Email: vendor-request@sjsu.edu
San Jose, CA 95192-0041	

Requirement to Complete Payee Data Record, STD. 204

A completed Payee Data Record, STD. 204, is required for payments to all non-governmental entities and will be kept on file at each State agency. Since each State agency with which you do business must have a separate STD. 204 on file, it is possible for a payee to receive this form from various State agencies.

Payees who do not wish to complete the STD. 204 may elect to not do business with the State. If the payee does not complete the STD. 204 and the required payee data is not otherwise provided, payment may be reduced for federal backup withholding and non-resident State income tax withholding. Amounts reported on Information Returns (1099) are in accordance with the Internal Revenue Code and the California Revenue and Taxation Code.

1	Enter the payee's legal business name. Sole proprietorships must also include the owner's full name. An individual must list his/her full name. The mailing address should be the address at which the payee chooses to receive correspondence. Do not enter payment address or lock box information here.
2	Check the box that corresponds to the payee business type. Check only one box. Corporations must check the box that identifies the type of corporation. The State of California requires that all parties entering into business transactions that may lead to payment(s) from the State provide their Taxpayer Identification Number (TIN). The TIN is required by the California Revenue and Taxation Code Section 18646 to facilitate tax compliance enforcement activities and the preparation of Form 1099 and other information returns as required by the Internal Revenue Code Section 6109(a). The TIN for individuals and sole proprietorships is the Social Security Number (SSN). Only partnerships, estates, trusts, and corporations will enter their Federal Employer Identification Number (FEIN). Payment will not be processed without an accompanying Taxpayer ID number.
4	<u>Are you a California resident or non-resident?</u> A corporation will be defined as a "resident" if it has a permanent place of business in California or is qualified through the Secretary of State to do business in California. A partnership is considered a resident partnership if it has a permanent place of business in California. An estate is a resident if the decedent was a California resident at time of death. A trust is a resident if at least one trustee is a California resident. Rules for assessing State taxes differ significantly from Federal tax rules. For individuals and sole proprietors, the term "resident" includes every individual who is in California for other than a temporary or transitory purpose and any individual domiciled in California who is absent for a temporary or transitory purpose. Generally, an individual who comes to California for a purpose that will extend over a long or indefinite period will be considered a resident. However, an individual who comes to perform particular contract of short duration will be considered a non-resident. Payments to all non-residents may be subject to withholding. Non-resident payees performing services in California or receiving rent, lease, or royalty payments from property (real or personal) located in California will have 7% of their total payments withheld for State income taxes. However, no withholding is required if total payments to the payee are \$1,500 or less for the calendar year. Prior to making payments to foreign citizens, United States tax laws require all employers to perform a tax analysis with respect to country of citizenship to determine residency for Federal tax purposes. For information on residency status, contact the Franchise Tax Board at the numbers listed below: Withholding Services and Compliance Section: 1-888-792-4900 Website: www.ftb.ca.gov For hearing impaired with TDD, call: 1-800-822-6268 Email address: wscs.gen@ftb.ca.gov
5	Provide the name, title, signature, and telephone number of the individual completing this form. Provide the date the form was completed.

PRIVACY STATEMENT

Section 7(b) of the Privacy Act of 1974 (Public Law 93-579) requires that any federal, State, or local governmental agency, which requests an individual to disclose their social security account number, shall inform that individual whether that disclosure is mandatory or voluntary, by which statutory or other authority such number is solicited, and what uses will be made of it. It is mandatory to furnish the information requested. Federal law requires that payment for which the requested information is not provided is subject to federal backup withholding and State law imposes noncompliance penalties of up to \$20,000.

You have the right to access records containing your personal information, such as your SSN. To exercise that right, please contact the business services unit or the accounts payable unit of the State agency(ies) with which you transact that business. All questions should be referred to the requesting State agency listed on this form.

Appendix Z.13 - Foreign Sources Statement

San Jose State University
Accounting Services Department
One Washington Square San Jose, CA 95192-0008
408 924-2262

Foreign Source Statement

I, _____, am not a United States citizen or permanent resident alien,
and all of my services for the San Jose State University were performed in

_____.

Brief description of the services:

Amount: \$ _____

Print Name: _____

Sign Name: _____

Date: _____

Appendix Z.14 - Certification of Receipt of Goods



Certification of Receipt of Goods Accounts Payable

Finance – One Washington Square – San José, CA 95195-0008

Main: 408-924-1558 Fax: 408-924-1698

This form is used in the event that an SJSU employee misplaces or does not receive a receipt for a purchase made with the university ProCard, GoCard or when the expense is paid out of pocket. If you are missing a receipt, please fill out this form and submit in conjunction with your monthly ProCard/GoCard Reconciliation, Employee/Student Reimbursement, or Travel Reimbursement request. The Certification Receipt of Goods form must be completed for each missing receipt.

Receipt Information

Supplier Name ¹ : _____	Receipt Date: _____
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Items Purchased

Quantity	Description of Purchase	Unit Price	Extension
Sub-Total:			
Tax:			
Shipping/Freight:			
Total:			

Reason itemized invoice/receipt was not obtained:

Department Approval

I certify that the goods listed above were received and were for San José State University business.

Employee/Cardholder Signature: _____	Date: _____
Print Name: _____	
Approving Official Signature: _____	Date: _____
Print Name: _____	

¹ Vendor name
receipt_of_goods.doc

Appendix Z.15 - FLP Site Visit Proposal Packet (Downloadable [HERE](#))