

Developing and Leading a May Term Overseas Course

What steps do I need to take to develop a May Term course?

Faculty with May Term overseas course ideas should download an EPC Course Request Form (<http://www.wartburg.edu/academics/forms-faculty.html>) to complete and submit to EPC (Educational Policies Committee) for approval. The proposal should address the purpose of the course, intended student outcomes, and give a reasonable sense of the faculty's ability to successfully implement the course overseas. In addition to the EPC form, Study Abroad encourages faculty to use the New Site Evaluation Form (see my.wartburg group site) that outlines key planning issues for new May Term courses.

Newly proposed courses designed to take place outside of the U.S. are reviewed by the MDS (Multicultural Diversity) committee as part of the EPC approval process. MDS' review helps to ensure that the course meets the requirements for a cultural immersion for DAC (Diversity Across the Curriculum) and the Intercultural Studies minor if that designation is being requested. Also, the committee may look at whether the proposed course seems to duplicate existing May Term courses and also considers the rationale and logistics provided for the course. The committee then votes on whether or not to endorse the course, which is then communicated back to EPC. For courses with Essential Education connections, the General Education Committee will also be asked to review the course proposal.

Once a May Term course has been approved by EPC, the MDS committee is responsible for reviewing and recommending approval to the Dean of Faculty and FDC (Faculty Development Committee) of any requests for faculty development cultural immersion funds (Fund #6) to help faculty travel to their intended location(s) in preparation for teaching the course. Download the application form under Faculty Development and the guidelines posted below the application. (<http://www.wartburg.edu/academics/forms-faculty.html>) In some instances, funding may be available for travel before EPC approval, especially if the faculty member has had limited experience in the country or culture, but can articulate a well-developed course idea.

The amount of FDC funding available may not meet the ever-increasing costs of travel, so faculty are encouraged to talk with their departments about supplemental funding or to the Dean of Faculty's office if the course will meet an Essential Education requirement.

Once funding has been approved by the MDS committee, you will receive an award letter issued by the Dean of Faculty's office with an account number for charging travel expenses. Faculty Development Committee will also be sent notification of your award. If you do not receive this letter please contact the Study Abroad Office at X8427.

Generally speaking, the college supports the philosophy that the faculty course leader should have adequate exposure to and understanding of the culture and logistics of the location(s) prior to traveling there with students.

What is the next step after EPC approval of my course?

Faculty who are considering a May Term course abroad or faculty who have received course approval are encouraged to use the my.wartburg May Term Leader group site. Resources such as materials, faculty mentors, and the Study Abroad staff have suggestions for further development and implementation of the course. If you are not a member of the May Term Leader website on my.wartburg contact Kathy Traetow at X8427.

The Dean of Faculty's office requires that two forms be completed and returned. The May Term Budget form and the May Term Travel Course Schedule are due in the fall preceding the offering of the May Term course. See details below and in Rich Seggerman's memo found in the Budget and Course Finances section.

Required Planning Forms – Both can be downloaded from the Wartburg website at (<http://www.wartburg.edu/academics/forms-faculty.html>). Submit together in the Fall Term of the academic year before the course to the office of the Dean of the Faculty

The Role of Study Abroad Regarding May Terms Abroad:

For all May Term courses traveling outside of the U.S., the Study Abroad program has responsibility for:

- a) providing support before, during and after the conducting of the course as requested/desired by the May Term faculty.
- b) serving as the crisis management office, including housing the files submitted by May Term faculty prior to departure.
- c) maintaining, updating and distributing forms required by the institution for students traveling outside the U.S.
- e) convening the May Term faculty periodically to provide an opportunity for communication and peer "mentoring."
- f) serving as a clearinghouse for information helpful to May Term course leaders.
- g) networking with professional organizations and other colleges and universities to stay up-to-date with best practices and trends in short-term study abroad.

Budget and Course Finances

TO: May Term Course Leaders
FROM: Rich Seggerman, Business Office
SUBJECT: May Term Course Finances

The following memo is an attempt to document the processes and procedures for handling the May Term course finances.

MAY TERM COURSE BUDGET FORM:

A course budget must be submitted to the Dean of Faculty's Office by the end of Fall Term of the academic year before the course. You can obtain a budget form from the my.wartburg group site or at <http://www.wartburg.edu/academics/forms-faculty.html>. The total course budget should cover not only the student's individual cost, but also the course leader's cost and any shared fixed cost. If the student will need "out of pocket" money for expenses directly related to the course (e.g. obtaining a passport, meals, etc.), then such amounts should be included on the budget sheet section under the "OTHER RELATED COSTS TO BE CONSIDERED IN FINANCIAL AID". This will allow the student to obtain loans to cover their required expenses for the course (no "voluntary" expenses such as souvenirs, entertainment not required for the class, etc. should be included).

If you have any changes to the cost per student for your May term course, please report the new budget amount to the Dean of Faculty by no later than **November 1** before the May Term of travel. This allows Financial Aid time to award any May term loan packages and allows the students time to apply for those loans. It also allows the students time to discuss financing of the course with their parents. If you cannot meet this deadline, please contact the Financial Aid Office.

CONTINGENCY FEE

The contingency fee can be used to help cover any changes in prices (e.g. airline tickets) the exchange rate, or any other contingency that you anticipate. A 3% to 10% contingency is recommended, however it is up to the instructor to develop a contingency plan and fee appropriate for the course destination. Please include a rationale for the contingency fee on your budget form.

Any unused contingency funds should only be distributed back to students after the completion of the course. In some instances, faculty have chosen to distribute contingency funds to students in-country only to have a need for the funds emerge during the return trip home.

COURSE COSTS TOO HIGH

What if the cost of my course seems to be higher than anticipated?

Hopefully your contingency fund will cover any unexpected increases in costs. If there are drastic increases that must be addressed, some faculty have redesigned the course for a shortened length of time overseas, looked for less expensive accommodations, eliminated elements in the course that are not absolutely essential to the content of the course.

The college encourages faculty to budget adequately to cover student costs and unexpected occurrences. Faculty should not feel obliged to personally subsidize course expenses.

MAY TERM COURSE FINANCIAL RESPONSIBILITY FORM:

A financial responsibility form should be:

1) created for each May term course

(download from <http://www.wartburg.edu/academics/forms-faculty.html>)

2) printed on Department letterhead, and

3) distributed to each student registered for the course.

The purpose of this form is to explain in writing to the student that the College will be making financial commitments based on their agreement to go on the May term course (i.e. being registered for the course) and that if the student decides not to remain in the course, he/she will be charged for a portion of the course, depending on when he/she drops the course in the Registrar's Office. May Term course leaders should collect the signed forms from each student and keep these forms on file until after the course is completed. The Controller's Office will only need the signed form from the students who drop the class and therefore, should be charged some amount according to the financial responsibility form they signed. There are several benefits of having such a form signed by each student, including the following:

- You can identify the students who aren't really that serious about going and thus allow other students to sign up for your class who are interested in going.
- You will be guaranteed to have the funds available in your May term course agency account, based on the amounts and dates included in your form. You don't have to worry if a student has paid for the course, because you will have guaranteed funds, based on the amounts and dates included in your form.
- You can focus on the academic relationship that you have with each student, and won't have to worry about having to have an uncomfortable interaction about finances.
- If a student decides not to go, you have a signed document that defines the student's financial responsibility and the Controller's Office will handle the situation from that point.

May term course leaders may start incurring expenses as soon as:

- 1) the course budget has been approved by the Dean of Faculty's office and
- 2) each registered student has signed a Financial Responsibility Statement.

This assumes that there are enough students registered for the course to make it financially feasible. Each May term course has a specific agency account, which is an account number on our general ledger records where you can keep track of money related to your course. Even though the students will not be billed until January, you will be allowed to have a temporary “deficit” in your May term course agency account. When the students are billed for a May Term course, a credit will show up in the agency account.

ROOM AND BOARD CREDIT:

If your May term course has your students gone from campus for 5 or more consecutive days, the student might be eligible for a May term room and/or board credit. Of course, the student would first have to be on a board plan or live on campus and be registered for your class. The May term room & board charges will be reflected on the student’s bill in January before the May Term travel and any related credits will be reflected on the students’ accounts at the beginning of March.

DROPPING STUDENTS FROM MAY TERM CLASSES:

It is College policy that students must have their account balance paid below \$1,000 as of February 10th to remain registered for a May Term course. You will be notified mid February if any students registered for your May term class may potentially have their May term registration cancelled due to non-payment. If a student’s registration is cancelled for non-payment, he/she would be allowed to re-register if they pay their balance below \$1,000, assuming you still have space available in your class.

DOCUMENTATION FOR COURSE EXPENSES:

All money for the May Term courses must go through the Controller’s Office. Each May term course leader is responsible for providing an appropriate level of accounting for the course. Many expenses are paid before you leave and therefore are well documented. However, other expenses while on the course may be more difficult to document. In order to remove any questions from students (or students’ parents) as to how the money was spent, it is suggested that you keep a log of expenses (see Sample Expense Log form on the my.wartburg group site.) If you can obtain receipts, that is the best form of documentation. However, many situations will not allow you to receive a receipt. Therefore, if you do not have a receipt for an item you paid for, it is suggested that you write the item in your log, include the date, a description, and amount. Then have a second party sign as a witness that you actually paid the amount to the vendor. Money should NOT be distributed to students. The budget process allows you to provide each student with the option of obtaining additional loan money if there are out-of-pocket expenses. If a course leader has money remaining, that money should be deposited in the Controller’s Office when the course leader returns. Then, a refund can be made to each student’s account, based on available funds in the agency account.

COLLEGE CREDIT CARD:

If you do not already have a college credit card, it is highly recommended that you contact Kristina Ladage in the Controller's Office to apply for one. This will simplify the documentation process for expenses that can be charged. Contact the Controller's Office to ask about higher credit limits to cover large purchases like group plane tickets. Before you leave you will want to ask Kristi to temporarily increase the spending limit on your card in the event of an emergency.

CARRYING CASH OVERSEAS:

In today's technological and interconnected world, depending on your destination, ATM cards and credit cards work just as easily as at home. However, if you will be traveling in an area where they will not, it is important to consider how you will carry large amounts of cash safely. Some faculty who carry concealed cash make it a practice to let one or two trusted students know that they are doing so, in case of emergency.

UPON RETURN:

After you return from your May term course you should submit your accounting (i.e. receipts and expense log) to Kristina Ladage in the Controller's Office. The total of the amounts you spent, plus the cash you returned, should equal the total amount you withdrew from your May term course agency account. Once all your final expenses have been processed, any remaining money must be credited back to the students' accounts. In the past, some May term course leaders have kept a "slush" fund for the next year, which is no longer allowed. Each May term agency account should have a -0- balance by the end of June.

If you have questions, comments, or feedback regarding this process, please contact Rich Seggerman at ext. 8215, e-mail richard.seggerman@wartburg.edu, or stop by Luther Hall 212.