

Utah Tech University Policy

604: Educational Travel and Study Programs



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I. Purpose

- 1.1 To establish Utah Tech University's ("the University") policy for the University's sponsored or affiliated educational travel and study programs.

II. Scope

- 2.1 This policy applies to all Domestic Travel, Faculty Exchange, International Travel, Study Abroad Program, Student Affiliate Program, Student Exchange Program, and Travel Study Program as defined in this policy.

III. Definitions

- 3.1 **Clery Crime:** The Clery Act required that certain crimes occurring on campus ("Clery Geography" as defined below) be tracked by the University, reported annually each October to the Department of Education, and shared with the University Community.
- 3.2 **Clery Tracking Trip Form:** A form required by University Policy 423: Campus Safety and Security to be completed and submitted by any entity/ person sponsoring a Clery-qualifying University Trip.
- 3.3 **Domestic Travel:** Educational travel within the United States and the District of Columbia that is Faculty-Led or conducted by an academic department/program/unit or by a Student Affiliate Program, or is Faculty Exchange.
- 3.4 **Domestic Travel Study Program:** An educational program within the United States and the District of Columbia that is Faculty-Led or conducted by an academic department/program/unit or by a Student Affiliate Program.

- 3.5 ***Faculty Exchange:*** A program which allows exchange of faculty between the University and a partner institution of the University for the purpose of faculty development, research, and course development.
- 3.6 ***Faculty-Led:*** Educational travel in which a University faculty member takes a group of students to another location with the purpose of enhancing or offering a course that is unique to the location.
- 3.7 ***Faculty-Led Study Abroad Proposal:*** A plan submitted by a University faculty member to the Study Abroad Office seeking approval for a Study Abroad Program which includes an application, program description, itinerary, justification, and budget.
- 3.8 ***International Travel:*** Educational travel outside of the United States and the District of Columbia, including U.S. Territories, that is Faculty-Led or conducted by an academic department/program/unit or by a Student Affiliate Program, or is a Faculty Exchange.
- 3.9 ***International Travel Insurance:*** Required insurance for any International Travel which must be purchased through the University's Purchasing Department from an approved provider.
- 3.10 ***International Travel Procedure Tips:*** A University Business Services form to be reviewed and referenced by individuals engaged in International Travel.
- 3.11 ***International Traveler's Checklist:*** A University Business Services form to be completed by an individual seeking to engage in International Travel in order for the University to assess risk, assist with safety, and prepare the individual for International Travel.
- 3.12 ***International Travel Itinerary and Contact Information:*** A University Business Services form to be completed with required information for everyone engaged in International Travel, which provides the University an itinerary for the traveler's trip, traveler contact information and destination emergency contact information.
- 3.13 ***International Travel Contact and Emergency Information:*** A University Business Services form that provides emergency contact information for each traveler at each international destination.
- 3.14 ***International Travel Waiver of Liability:*** A University Business Services form that provides for the waiver by an individual of any liability claim against the University and its representatives, including but not limited to, its administrators, employees and trustees.

- 3.15 ***Restricted Travel Area:*** Any location for which the U.S. State Department (DOS) has issued a Level 3 or Level 4 Travel Advisory, or the Centers for Disease Control and Prevention (CDC) has issued a Warning Level 3, or a location for which the University has restricted travel.
- 3.16 ***Study Abroad Course:*** An educational class offered in conjunction with a Study Abroad Program.
- 3.17 ***Study Abroad Fee:*** A charge for participating in a Study Abroad Program that may include, but is not limited to, travel, application, room, and board.
- 3.18 ***Study Abroad Program:*** An educational program requiring International Travel, that is Faculty-Led or conducted by an academic department/program/unit, a Student Affiliate Program, or a Student Exchange Program.
- 3.19 ***Study Abroad Risk Management & Safety Committee:*** A committee to review Level 4 travel exceptions composed of a representative from Risk Management, the University's Police Department, the Study Abroad Coordinator, a member of the Study Abroad Executive Committee, and an attorney from the Office of General Counsel in an advisory role.
- 3.20 ***Study Abroad Travel Checklist for Faculty Leaders:*** A Study Abroad office form to be completed by a Trip Leader as part of their pre-departure preparations.
- 3.21 ***Student Affiliate Program:*** A University-approved third-party organization offering international semester-long or summer educational travel opportunities to students.
- 3.22 ***Student Exchange Program:*** A program in which a student studies abroad at one of the University's partner institutions and pays tuition to the University. Typically, the student attends the partner institution for an entire semester.
- 3.23 ***Travel Authorization:*** A University Business Services form to be completed by a University employee to obtain the University's authorization for travel.
- 3.24 ***Travel Study Program:*** A Domestic or International Travel program that is Faculty-Led or conducted by an academic department/program/unit.
- 3.25 ***Trip Leader:*** The University employee responsible for a Travel Study Program or Study Abroad Program.
- 3.26 ***Trip Emergency Action Plan:*** A document created by a Trip Leader for International Travel prior to seeking the University's authorization for

International Travel.

IV. Policy

- 4.1 University-funded and/or University-sponsored Travel Study Programs, whether Domestic Travel or International Travel, must be preapproved by the appropriate supervisor(s) or University authority as outlined in Section VI. Procedures. Continued ongoing review by the appropriate University authority as well as the University's Purchasing, Risk Management and Study Abroad offices must be done throughout the process of seeking approval for travel. Faculty and staff participating in non-University sponsored/funded travel are prohibited from using University resources or representing in any way that the University is sponsoring or funding the non-sponsored/funded travel.
- 4.2 If the University's name and/or resources are used and/or associated in any manner with the promotion or implementation of educational group travel, then the travel is deemed an official activity of the University and must abide by the following requirements:
 - 4.2.1 All student participants must enroll in either a credit-bearing course, such as a "2990 Seminar," or a non-credit course related to the travel.
 - 4.2.1.1 In the case of a credit-bearing Travel Study Program, the course must meet the same academic standards, award similar credit, and be subject to the same University control as other courses and programs offered by the University (see Policy 603 Curricular Integrity of Special Learning Activities).
 - 4.2.1.2 Consistent with University Policy 603, academic credit will not be awarded for travel alone; instead, students are required to complete an academic project.
 - 4.2.1.3 Any University entity that sponsors a trip as detailed in Policy 423, 4.12 is required to enter details of this trip on the University's Clery Tracking Trip Form.
 - 4.2.2 As an official University activity, a Travel Study Program's liability is generally covered under the University's State Risk Management insurance with the following exception:
 - 4.2.2.1 International Travel is not covered under the University's State Risk Management insurance and requires the purchase of University Risk Management-approved International Travel

Insurance through the University's Purchasing Department as set forth in Section VI. Procedures.

- 4.2.3 A Travel Study Program may not unduly take students and/or faculty away from regularly-scheduled courses. Travel Study will be scheduled in such a way that it does not require students and/or faculty to leave their regularly-scheduled courses for more than two (2) days.
- 4.2.4 The costs of operating a Travel Study Program are covered by the revenue generated from the fees charged to participants. If for any reason the actual costs of the Travel Study Program exceed the revenue generated through these fees, the operating budget of the faculty's academic program or the sponsoring academic administrative unit must cover the shortfall.
- 4.2.5 Travel is subject to University Policy 423, 4.12 Clery reporting requirements for University Trips.

4.3 Domestic Travel Study Program

- 4.3.1 Before advertising or promoting a Travel Study Program, the sponsoring faculty, program, or unit must receive the respective academic dean's approval. In seeking approval, the faculty or academic program must demonstrate the following to the dean:
 - 4.3.1.1 That all participants will be enrolled in either a credit or not-credit course;
 - 4.3.1.2 That credit is not awarded for travel alone;
 - 4.3.1.3 That the Travel Study Program does not unduly take students or faculty away from other regularly-scheduled coursework or duties; and
 - 4.3.1.4 That there is sufficient revenue to cover all of the Travel Study Program's expenses, either from the Travel Study Program's student-generated fees or from the operating budget of the sponsoring academic program or unit.
 - 4.3.1.5 That Clery statistics will be collected in all locations used by students and controlled by the University during the trip and used to support educational purposes, per University Policy 423, 4.12 and required report details will be submitted on the University's Clery Tracking Trip Form.

4.4 Study Abroad Program

- 4.4.1 Before advertising or promoting any Study Abroad Program, the sponsoring faculty, program, or unit must meet all requirements as stated in this policy and procedures and the Study Abroad Office Proposal Development Procedures. (See Addenda for a link to the Faculty Resources section on the Study Abroad website).
- 4.4.2 International Travel to destinations which have a Level 4 Travel Advisory on the US State Department's website generally will not be approved. For a Level 4 travel exception to be made, a request for exception must be reviewed and approved by the Study Abroad Risk Management & Safety Committee; all program participants must execute an additional liability waiver specific to the Level 4 status; and all program participants must complete a Risk Management consultation and training prior to travel to a Level 4 destination. International Travel to destinations which have a Level 3 Travel Advisory should reconsider travel and will only be approved when the business circumstances warrant an increased risk of travel and require a Risk Management Consult. Level 2 travelers should exercise increased caution, and Level 1 travelers exercise normal precautions. See the Procedures section below for required steps that will guide faculty, staff, and students seeking approval for International Travel.
- 4.4.3 Participants in a Study Abroad Program must meet all requirements stated in University policy and listed under the Study Abroad Program on the Study Abroad website (See Addenda for a link to the Study Abroad website) to participate in any Study Abroad Program. Additionally, compliance with the following Clery reporting requirements must be met:
 - 4.4.3.1 If the University sends students on a Study Abroad Program at a location or facility that the University does not own or control, the University does not have to include statistics for Clery Crime that occur in those facilities. However, if the University rents or leases space for University students in a hotel or student housing facility, the University is in control of that space for the time period covered by the agreement, and Clery Crime Statistics must be included as Non-Campus Clery Geography.
- 4.4.4 Any University entity sponsoring any trip is required to enter details of the trip on the Clery Tracking Trip Form.

4.4.4.1 Faculty-Led Study Abroad Program

4.4.4.1.1 A Faculty-Led Study Abroad Proposal must be submitted and approved by the Study Abroad Office according to the procedure described in Section VI below.

4.4.4.1.2 Faculty Eligibility and Compensation

4.4.4.1.2.1 University faculty and staff who hold credentials making them eligible to teach courses in the specific department offering the credit associated with the trip may be instructors for a Study Abroad Course(s) pending submission and approval of a Faculty-Led Study Abroad Proposal through the Study Abroad Office.

4.4.4.1.2.2 Faculty will be compensated in accordance with credit hours produced by the Study Abroad Course and in accordance with Faculty Workload Policy 635 as well as travel fees not to exceed the amount listed in the Faculty-Led Study Abroad Proposal.

4.4.4.1.3 The time spent and assignments required may not count for two courses associated with one trip.

4.4.4.1.4 A Study Abroad Course may be dual-listed under two prefixes if the instructor qualifies to teach in two areas (e.g. English & History).

4.4.4.1.5 Study Abroad Fees may be attached directly to student accounts and are excluded from the curriculum course fee approval process described in University Policy 614. Instead, these fees undergo a separate approval process outlined in University Policy 614.

4.4.4.1.6 If a Study Abroad Course requires a course fee as outlined in Policy 614, the regular curriculum approval process must be followed.

4.4.4.1.7 Faculty-incurred expenses (transportation, lodging and food) may be covered by the Study Abroad Fee, calculated by dividing the estimated expenses evenly among participating students.

- 4.4.4.1.8 Tuition is refundable based on the University's refund deadlines.
- 4.4.4.1.9 All other fee refunds are determined by the refund date published for each trip and are only refundable to the degree that non-recoverable costs have not been expended.
- 4.4.4.1.10 Airfare to and from the International Travel location for faculty leaders may be covered by a third-party affiliate; however, any offer of additional airfare or compensation by a third-party affiliate may not be accepted by a faculty member without preapproval from the Study Abroad Office and Business Services, and will not be approved for use by a faculty leader's family or friends.
- 4.4.4.1.11 If airfare is provided by a third-party affiliate, it may not be included in the calculation of the Study Abroad Fee.
- 4.4.4.1.12 When third party affiliates are used to help facilitate a Faculty-Led program, the contract to engage the third-party affiliate must be approved by the University's Office of General Counsel.
- 4.4.4.1.13 Travel Account Balance
 - 4.4.4.1.13.1 At the completion of a Study Abroad Program, after all expenses and revenues have been reconciled, any remainder in the Study Abroad Fee balance over \$100 per student will be refunded.
 - 4.4.4.1.13.2 Non-refunded excess fees remain in the Study Abroad Program's specific trip index code to be used for future trips.
 - 4.4.4.1.13.3 If a trip is not repeated for two academic years, any excess funds will be transfer to the Study Abroad Office account.
 - 4.4.4.1.13.4 Any non-refunded excess balance of a Study Abroad Fee may only be used to support future Study Abroad Programs or the Study Abroad Office.

4.4.4.2 Student Exchange Program

4.4.4.2.1 Administration of a Student Exchange Program follows guidelines established in the MOU or Exchange Program Agreement approved by the Office of General Counsel and the Study Abroad Office procedure for each individual Student Exchange Program.

4.4.4.3 Student Affiliate Program

4.4.4.3.1 Third-party affiliates that have been vetted and approved by the University are recognized as a Student Affiliate Program.

4.4.4.3.2 A student participating in travel with an unapproved affiliate is considered to be undertaking an independent travel experience unassociated with the University. Contact the Study Abroad Office for a list of University-approved affiliates.

4.4.4.3.3 A student applying for a Student Affiliate Program must follow procedures established by the Study Abroad Office. (See Addenda for a link to the Affiliate Program section on the Study Abroad website).

4.5 Reporting Title IX and Non- Title IX Discrimination, Harassment and/or Retaliation

4.5.1 Report any incident of, or concern regarding Title IX and Non-Title IX Discrimination, Harassment and/or Retaliation to the University's Director of Equity Compliance and Title IX by phone (435-652-7747) via email to titleix@utahtech.edu or report@utahtech.edu, or by completing the Incident Report Form https://cm.maxient.com/reportingform.php?UtahTech&layout_id=0.

4.6 Faculty Exchange

4.6.1 A Faculty Exchanges is governed by the general MOU and specific Letter of Agreement (LOA) signed by the officials with signature authority representing the participating universities.

4.6.2 The Global Education Office maintains a repository of MOUs and LOAs signed by the University authorities or designees and follows the directives contained in them to ensure the agreements are implemented.

V. References

- 5.1 University Policy 154: Title IX Sex-Based Discrimination, Sexual Harassment and Retaliation
- 5.2 University Policy 164: Protected Class and Non-Title IX Discrimination, Harassment, Sexual Harassment and Retaliation
- 5.3 University Policy 224: International Travel
- 5.4 University Policy 423: Campus Safety & Security
- 5.5 University Policy 603: Curricular Integrity of Special Learning Activities
- 5.6 University Policy 614: Academic Fees
- 5.7 University Policy 635: Faculty Workload

VI. Procedures

- 6.1 Study Abroad Procedures
 - 6.1.1 A Faculty-Led Study Abroad Proposal must include an application, program description, itinerary, justification, and budget (See Addenda for a link to the University's website).
 - 6.1.2 In seeking approval, the faculty or academic program must demonstrate adherence to all requirements stated in this policy and by the Study Abroad office:
 - 6.1.2.1 Each Faculty-Led Study Abroad Proposal must be reviewed and approved by the following entities: department chair, dean, Study Abroad Advisory Board, Global Education Director, and the Vice President of Academic Affairs and Provost, and President.
 - 6.1.2.2 A new proposal must be submitted for approval each year, even if the Study Abroad Program has been approved in the past.
- 6.2 International Travel Procedures
 - 6.2.1 Allow adequate planning time for, preparation, review and approval. To allow sufficient time for the approval process for International Travel, the Trip Leader must complete a Travel Authorization and obtain appropriate approval signatures on the Travel Authorization; complete an International Travel Traveler's Checklist, International

Travel Contact and Emergency Info Form, and International Travel Itinerary and Contact Information form; purchase participants' International Travel Insurance; establish a Trip Emergency Action Plan; and have participants sign a Waiver of Liability and any other required documentation for submission for final approval by Business Services Travel Office a minimum of thirty (30) days prior to the proposed departure date.

- 6.2.2 Secure permission with the Department Chair/Dean, or Executive Director/Director to determine feasibility of funding for the proposed travel. Prospective travelers are encouraged to evaluate the proposed travel using the principles of prudence and essentiality. Travel should also be in harmony with the University's mission.
- 6.2.3 Create a detailed itinerary for travel and include budget, locations, dates, times, mode of transport, in-country contacts, lodging, safety/security action plan, daily activities, and a list of participants.
- 6.2.4 Review relevant laws, regulations, customs, and regulatory compliance requirements such as export laws and controls.
- 6.2.5 Review the United States Department of State and the Center for Disease Control websites for warnings or travel alerts for the travel destination to determine if the location is a Restricted Travel Area.
- 6.2.6 Create a written Trip Emergency Action Plan and/or consult with University Risk Management. List emergency and other important contacts domestic and abroad. Develop safe emergency meeting places. Things to consider for the plan include what to do for lost or stolen documents, medical problems, financial contingency, security protection, communication barriers, transportation, civil unrest/threats, evacuation, abduction, weather-related emergencies, and seeking legal advice.
- 6.2.7 All travelers must complete the International Travel Waiver of Liability.
- 6.2.8 International Travel Insurance is required for all international travelers. Purchasing Services facilitates the purchase of this insurance through the approved insurance provider. Contact Purchasing Services for more information.
- 6.2.9 Employees must leave a copy of all documentation with the employee's direct supervisor.

6.3 Payment Procedures

- 6.3.1 All payments by Study Abroad Program student participants must follow procedures set forth by the Study Abroad and Business Service offices.
- 6.3.2 Individuals making Study Abroad Fee payments must have submitted a completed Study Abroad Application, paid the non-refundable Study Abroad application fee, and have been accepted for a specific International Travel program before payment is accepted.
- 6.3.3 All payments for Faculty-Led programs must be made to the University and not directly to the Faculty Leader. All Payments for Student Affiliate Programs are made directly to the Affiliate Program provider according to the University's current agreement with the Affiliate Program.

6.4 Pre-departure Procedures

- 6.4.1 Faculty Leaders must complete all required items on the Study Abroad Travel Checklist for Faculty Leaders (See Study Abroad Office for checklist).
- 6.4.2 The Study Abroad Travel Checklist for Faculty Leaders will facilitate completion of forms/information requirements (travel insurance, emergency plan, and signed waiver of liability) referenced in University International Travel Policy 224.

6.5 Student Exchange Procedures

- 6.5.1 A Memorandum of Understanding (MOU) or exchange agreement must be approved by the Global Education Office, reviewed and approved by the Office of General Counsel and signed by both an Official with Signature Authority on behalf of the University and an international partner institution prior to a student participating in an exchange program approved by the University.

6.6 Faculty Exchange Procedures

- 6.6.1 An MOUs or LOA for a Faculty Exchange must be vetted and preapproved by the Global Education Office and the Office of General Counsel.
- 6.6.2 Faculty seeking to participate in a Faculty Exchange must secure the approval of the Faculty member's chair and the dean of the academic

unit conducting the exchange, and the Global Education Office prior to formalizing any arrangement with the host institution.

- 6.6.3 A Faculty member seeking a Faculty Exchange must request the recommendation of the Vice President of Academic Affairs and Provost and permission from the University President as stipulated in University Policy 224: International Travel.

VII. Addenda

- 7.1 For forms, tables and related procedures please use the following link to the Business Services office website:
http://utahtech.edu/busoff/travel_information.php
- 7.2 This is a link directly to the forms section of the Business Services website:
<https://employees.utahtech.edu/business-services/travel-information/travel-forms/>
- 7.3 This is a link directly to the Faculty Resources section of the Study Abroad website: <https://studyabroad.utahtech.edu/faculty-leader-resources/>
- 7.4 This is a link directly to the Study Abroad website:
<https://studyabroad.utahtech.edu/>
- 7.5 This is the link directly to the Affiliate Program section of the Study Abroad website: <https://studyabroad.utahtech.edu/>

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