

Handbook for Faculty Program Leaders—Taking a Group of Students Abroad

Brooklyn College Faculty are strongly encouraged to students abroad. Taking students abroad is an excellent opportunity for faculty to share their academic expertise as well as their area studies expertise. The best times for students to go abroad with faculty are during Winter intersession or during summer I and summer II sessions. The following information applies to faculty taking students abroad for a study abroad course, not to faculty planning to travel with students for research—which is a different set of CUNY rules.

Examples of Brooklyn college faculty led programs can be found at <http://www.brooklyn.cuny.edu/web/academics/international/opportunities.php>.

Introduction To Leading a Program Abroad

Should I lead a program abroad?

If you love teaching, mentoring, and would like to share your expertise daily with a group of students over a period of several weeks, definitely!

What makes a good program leader?

A good program leader is someone who: Has enthusiasm to impart your knowledge of your academic specialization and area knowledge to students; Wants to spend more time with students than just in the classroom and office hours; Is willing to serve as guide, teacher, mentor, organizer, cross-cultural interpreter, and problem solver; Is flexible and has a good sense of humor.

How am I paid?

Faculty salary and expenses are paid from the tuition dollars of enrolled participants. Faculty are paid for summer I and summer II sessions at their hourly adjunct salary rate. Untenured winter intersession faculty swap a spring course for the winter course, and their department is reimbursed with the corresponding adjunct salary rate to hire a substitute teacher for the course not taught in the spring (or fall). Both non-tenured and tenured faculty must meet with their department chair about winter term teaching plans and possible conflicts with course overloads as the chair must be able to schedule courses and confirm that pay is available.

How do I pay my own expenses?

Program leaders may use a university travel card to pay for program related expenses of round trip airfare, US taxis, and hotels (if part of program cost) for themselves (only). In addition, faculty may request an advance for their own expenses. (The amount of the advance is determined by the IEGE approved and pre-determined program budget and the number of program participants). With advance planning, the use of a travel card and the advance will minimize the need for out of pocket expenses. A way to pay for *student* expenses without taking wads of cash abroad is to have the company providing the service (travel, lodging, classroom rental etc.) send an invoice to IEGE in which the cost per student is detailed and the specific services provided.

What's the downside of taking a group abroad?

There is a lot of paperwork involved and at the end of the program there is the somewhat time-consuming cost accounting and reimbursement paperwork. IEGE tries to help out as much as it can but the responsibility for entering the travel authorization and end of program expense report in CUNYfirst is the primary responsibility of the faculty member/program leader. Faculty will need to allocate time to recruiting students (IEGE also assists with this but there is no substitute for a highly involved faculty member to make recruitment a success), meeting with students to discuss the program, preparing and carrying out a pre-departure orientation; arrange housing and classroom space abroad.

How many students must I take on my program?

A financially viable program for one program leader and no additional support will have a minimum of about 12 students paying 3 credits of tuition each. However, the program may have fewer or more students depending on credit load, location, risk management issues, number of times the program has been operating, pay level of faculty, if participants are in-state or out-of-state or graduates, additional personnel, etc.

What happens if something goes wrong during the program?

IEGE has a 24/7 number faculty can call for advice and assistance. All program participants and faculty will have CISI travel and health insurance with on the ground resources and will even evacuate the group if there is an extreme event. Program leaders may also have developed contacts in the local area that can serve as resources.

What do I need to do to begin thinking about leading a program abroad?

- 1) Review the [Program Planning Timeline](#) [link to timeline]
- 2) Draft a paragraph or two on one or more ideas that are of interest to you.
- 3) Write or call the Sr. Director of IEGE to schedule a meeting to discuss your ideas for taking a group of students abroad and help answer your questions: 718-951-5189 or send your ideas to abier@brooklyn.cuny.edu and indicate some times/days you are available to meet. There are also program leader faculty workshops, either in group or individually, where your questions can be answered and you can brainstorm ideas.
- 4) Draft a three-week calendar of what daily activities might look like (breakfast, classes, lunch, excursions, debriefing, reading, study time, free time, etc.)
- 5) Create an [Estimated Budget](#) [link budget page here] that covers the activities on your calendar, and discuss the budget with the Sr. Director of IEGE
- 6) As you refine your program idea, lots of changes might be made in the original plan.

TIPS on a putting together a successful program

1. Plan to lead a study abroad program for at least three years—start simple in year one. You will learn a lot that will be useful in following years.
2. Pick a subject/course that is in demand by students (requirement course, pathways course, attracts students from more than one department)
3. Understand the top reasons why students go abroad.

4. After the program is reviewed and approved by IEGE, create a program web page using BC faculty resources, google sites or WordPress and include itineraries, photos, videos, syllabi, and information on housing, co-curricular activities.
5. Use social media to advertise:
 - a. Facebook
 - b. Blog
 - c. Link to IEGE webpages and IEGE Facebook page
 - d. Link to departmental webpage

CUNY Travel Guidelines—A must read for Program Leaders who wish to take students abroad
<http://www.cuny.edu/about/administration/offices/ehsrm/riskmanagement/travel/IntlTripandTravelGuidelines10.10.2014.pdf>

Program Leader 2.0 --Pre-program departure activities and paperwork

Recruitment of students

The best recruitment/retention tool for having students sign up for your program is the program leaders face to face contact with students, enthusiasm about the upcoming program, meeting with students and responding to emails. Some program leaders create a program website. In addition, IEGE will post program information on its website, advertise the program at study abroad tabling events, posts information on CUNY, IIE, and Go Abroad webpages. It will create a one page handout for students and talk about short term study abroad during its 1 pm information session. IEGE also sends out email blasts to the campus community. Please consult the CUNY International Travel Guidelines for useful information on content of the pre-departure orientation.

Pre-departure Orientation

In addition to the recruitment meetings program leaders will have with potential participants, all program leaders are required to hold at least one pre-departure orientation that covers an overview of the course, behavioral expectations, academic requirements, cultural overview of the location, cross cultural expectations, any risk management issues and how they will be handled, among other topics. IEGE staff are available to assist as requested. The CUNY international travel guidelines provide a list of topics to be covered during orientation. This information should be repeated once the group has arrived and settled in.

Required Paperwork Before You Leave

1. Paper copy of the travel authorization. Once final approval is received from IEGE for the Program Budget, program leaders (as well as other participating faculty) must complete a paper copy of the Travel Authorization and submit it to IEGE:
[http://www.brooklyn.cuny.edu/web/off_budget/Brooklyn_College_Authorization_to_Travel_Form_\(Extended\).pdf](http://www.brooklyn.cuny.edu/web/off_budget/Brooklyn_College_Authorization_to_Travel_Form_(Extended).pdf)
2. The online CUNYfirst travel authorization. In order to set aside funds to cover the budgeted expenses, each participating program leader, staff and faculty who expect to get paid and

have expenses reimbursed must complete the online CUNYfirst travel authorization. Instructions on how to do so can be found at:

https://www.gc.cuny.edu/CUNY_GC/media/CUNY-Graduate-Center/PDF/Office%20of%20business%20and%20finance/Accounts%20payable/How-to-Create-a-Travel-Authorization.pdf

3. Request for advance of funds to cover faculty, program leader and/or student expenses. This is optional but will minimize the out of pocket payments faculty will make while abroad for her/his and student expenses. The program leader can request an advance to cover her/his individual program leader costs. Faculty will request an advance by completing two forms (Request of payment and a promissory note):
 - a. [http://www.brooklyn.cuny.edu/web/BC_Member_Organization_Payment_Request\(4\).pdf](http://www.brooklyn.cuny.edu/web/BC_Member_Organization_Payment_Request(4).pdf)
 - b. Promissory note—(see IEGE)Submit both to IEGE for review and forwarding to FBSC.

Program Leader 3.0—Tracking expenses, requesting reimbursement and clearing advances

Tracking expenses while abroad

In order to be reimbursed for program expenses, either your own program leader expenses or expenses paid on behalf of the students, you must have a receipt for each paid expense. It is important to separate receipts for program leader expenses/faculty expenses from receipts for student expenses. Keep a spread sheet for each (student, program leader), as expenses are paid you should collect the receipt, number the receipt, and on a spread sheet write the number of the receipt, date of receipt, name of item paid (dinner, entrance fees, etc.), amount and in which currency. Do this on a daily basis. Keep all receipts in an envelope along with the spread sheet.

When the program is over, you will need to clear your advance for program leader expenses (this is done through CUNYfirst) and for student expenses (this is done through FBSC). See below for more details. **Note:** You can claim reimbursement only for your own expenses—you may not claim reimbursement for expenses of other faculty, participants, hosts, guests, etc.

Reimbursement Process and Clearing of Advances for Faculty Led Programs

Receiving a reimbursement for program expenses

Now that you have spent all that money, you will need to submit the receipts and other documentation to clear your advance, if you received one, or to receive a reimbursement, if you paid out of pocket.

Please note that, if you received an advance, all reimbursement documentation must be submitted within 15 days of your return (per the promissory note agreement you signed for the advance). If you paid out of your own pocket, you can take all the time you want, however, reimbursement documentation must be cleared within the same fiscal year if you want to be

RECEIPT NUMBER	DATE	LOCAL CURRENCY	CONVERSION RATE	US DOLLAR AMOUNT	Transportation (taxi, bus, train)
					taxi
					bus
					train
Total for transportation					

RECEIPT NUMBER	DATE	LOCAL CURRENCY	CONVERSION RATE	US DOLLAR AMOUNT	Lodging (hotel expenses paid out of pocket)
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Total for lodging

RECEIPT NUMBER	DATE	LOCAL CURRENCY	CONVERSION RATE	US DOLLAR AMOUNT	Miscellaneous (med. Insurance, tolls, parking, visa fee baggage fees, etc.)
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Total for miscellaneous

- For Currency Conversion use OANDA currency conversion for the day of the expense:
<http://www.oanda.com/currency/converter/>
- Organize your receipts and tape all to 8 1/2 x11" paper (so they can be photocopied).
(Copies may be done in IEGE).
- Attach your original boarding passes.
- Attach a letter of explanation (letter of "justification") of the miscellaneous expenses (as necessary to program operation). (Remember that before leaving, you conferred with IEGE and/or Accounts Payable as to the acceptable types of miscellaneous expenses. (For example, no personal hygiene items, medications, etc. are allowed).
- Attach program course description (available in IEGE or on website).
- Attach copy of paper Travel Authorization completed before departure.
- Attach a paper copy of the completed Travel Voucher (except for the final amounts to be reimbursed)
http://www.brooklyn.cuny.edu/web/off_budget/Brooklyn_College_State_of_New_York_Travel_Voucher_%28Extended%29.pdf

b. Review all of the above, including the spreadsheet, with Sr. Director of IEGE.

c. Once reviewed between program leader and IEGE, the packet will go to Accounts Payable (Gulnoza Shakirova) for review of acceptable receipts. Once Gulnoza approves the submission,

she will notify you to go ahead and enter all the information into the CUNYfirst travel reconciliation.

d. Before entering the information into CUNYfirst:

- Finalize the approved expenses with a signed paper copy of the New York State Travel Voucher (new document) approved by IEGE Sr. Director and submitted to Accounts Payable (Gulnoza Shakirova). You can download the Travel Voucher at: [http://www.brooklyn.cuny.edu/web/off_budget/Brooklyn_College_State_of_New_York_Travel_Voucher_\(Extended\).pdf](http://www.brooklyn.cuny.edu/web/off_budget/Brooklyn_College_State_of_New_York_Travel_Voucher_(Extended).pdf)
- Make photocopies of the approved Travel Authorization, the original receipts, boarding passes, travel authorization explanation of the miscellaneous expenses (as necessary to program operation), the Travel Voucher. You will need the photocopies to scan and upload into CUNYfirst.
- Obtain the appropriate CUNYfirst budget code for your program from the Sr. Director of IEGE.

e. To prepare for entering information into the CUNYfirst expense report, you will need to have at hand:

- An Excel spreadsheet listing all program leader expense receipts with categories showing daily OANDA conversion rates.
- Photocopy of original itemized receipts (hotels, dinner/food, excursions, bus, car rental, misc.) to be uploaded into CUNYfirst (You may use the IEGE copier for this)
- Copies of the boarding passes
- Program course description (available in IEGE or on website)
- Copy of approved travel authorization from CUNYfirst
- Paper copy of the travel authorization
- Copy of signed hard copy of Travel voucher that indicates the amount being claimed (only do so once everything is approved)

f. Create an expense report in CUNYfirst (employee self-service). Instructions on how to create an expense report: [https://www.gc.cuny.edu/CUNY_GC/media/CUNY-Graduate-Center/PDF/Office%20of%20business%20and%20finance/Accounts%20payable/How-to-Create-an-Expense-Report-\(New\).pdf](https://www.gc.cuny.edu/CUNY_GC/media/CUNY-Graduate-Center/PDF/Office%20of%20business%20and%20finance/Accounts%20payable/How-to-Create-an-Expense-Report-(New).pdf)

g. Upload scanned copies of the receipts, copies of boarding passes, travel authorization, travel voucher, program description. (You may use the IEGE photocopy to copy these documents).

h. Change the “accounting default” budget number (which is your academic department’s) to the IEGE program budget number (obtain from IEGE).

i. Upload receipts, boarding pass copies, travel authorization, travel voucher, program description, and miscellaneous justification.

j. Once you have submitted the expense report to CUNYfirst, it will be approved by your department chair, IEGE, and Accounts Payable. Your reimbursement amount will be deposited into the account where you receive your paycheck.

k. CLEAR THE ADVANCE for your Program Leader Expense: IF you received an advance for faculty expenses, once you have received reimbursement for the program leader expenses, you must immediately pay back your advance to FBSC member organization. To do so, write a check for the amount of your advance made out to Member Org (name of program) and submit it together with a BC Member Organization Payment Request Form that indicates you are repaying the advance Submit to Fiscal and Business Services in 1146 Boylan Hall:
[http://www.brooklyn.cuny.edu/web/BC Member Organization Payment Request\(4\).pdf](http://www.brooklyn.cuny.edu/web/BC_Member_Organization_Payment_Request(4).pdf)
It is very useful if you make a copy of both and give one to the Sr. Director of IEGE.

Reimbursement procedures for Advances received for **STUDENT PROGRAM EXPENSES**

The good news is that this submission is not done (yet) through CUNYfirst.

a. Gather together and/or prepare the following materials:

- An Excel spreadsheet listing all receipts with categories showing conversion rates—FBSC would like you to use a specific format which is indicated below.
- Original itemized receipts (hotels, dinner/food, excursions, bus, car rental, misc.) taped to sheets of paper; the receipt number will correspond to the number on the spreadsheet
- Program course description (available from IEGE)
- A list of student participants (available from IEGE)
- Original boarding passes of the students
- Copy of the original request for the advance (available from IEGE)
- MO payment request form indicating request to clear the advance, and the amount.
[http://www.brooklyn.cuny.edu/web/BC Member Organization Payment Request\(4\).pdf](http://www.brooklyn.cuny.edu/web/BC_Member_Organization_Payment_Request(4).pdf)
- If advance was more than receipts submitted, also submit a check made out to Member Organization to make up the difference. If the receipts are more than the amount was advanced, and funds are available, request reimbursement.

b. Submit the above materials to the Sr. Director, IEGE for review. Once reviewed together with the program leader, the paperwork will be submitted to FBSC/MO for clearance of advance and/or payment.

Study Abroad Advance (Include Location of Trip)
Dates of Trip
STUDENT expenses

<u>Receipt Number</u>	<u>Receipt Date</u>	<u>Item</u>	<u>Vendor</u>	<u>Amount in</u> <u>Local</u> <u>Currency</u>	<u>Amount in US</u> <u>dollars**</u>
1					
2					
3					
4					
5					
6					
7					
8					
9					
16					
				<hr/>	\$- Total Amount of Receipts
					Minus Advance Amount
					<hr/> \$- Balance/Difference

If converting, use the
daily rate from
OANDA currency
conversion

Preparing for Next Year’s Program

Congratulations, next year’s program is already mostly in place because of all the work you did for the first year of the program.

- Debrief with Director of IEGE about your experiences and thoughts on the program that has just finished.
- Meet informally with the participants of the program to celebrate the program and to get feedback on suggested changes.
- Send an Email to iege@brooklyn.cuny.edu indicating you would like IEGE to post your program for the next year and indicate tentative dates.
- Submit an updated budget (things may have cost more or less than expected, you may wish to do other activities) to IEGE.
- Once the budget and initial program content has been approved, start recruiting!
- Be sure to keep up ongoing communication with IEGE—they are your champions for your program too.