



## UCLA Travel Study Program Guidelines

The UCLA International Education Office (IEO) welcomes returning summer Travel Study programs. IEO staff work with students, faculty, and departments to create, manage, and promote study abroad programming that adheres to the field's and the University's best practices. As you assemble the details for your Travel Study program, we are always here to help. We have developed the following document to help familiarize you with the structure of Travel Study, expectations of departments and chairs, important policies and procedures, and roles and responsibilities for both IEO staff and the faculty director. Please read through this document before submitting your details for the coming year, and let us know if you have any questions throughout the submission process.

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### How the Process Works

Proposals for **new** programs are reviewed by the IEO faculty director and staff in consultation with the Senate Committee on International Education as needed.

**New** program proposals for Summer 2024 are due by **Monday, June 5, 2023** and approval decisions are typically made by end of summer.

All **returning** programs for Summer 2024 require faculty director, department chair, and MSO signatures in order to be approved for return. Signed versions of this form are due by **Monday, September 25, 2023** and may be emailed with the Program Planning Document, syllabi, and program itinerary to Danielle Samek directly.

The following conditions must be met for all programs:

- All program proposals must have department chair approval;
- Travel Study Program Directors need to be members of the UCLA faculty and well-versed in the location in which the program will be offered with preference given to ladder-UCLA faculty first;
- Programs must include a minimum of eight (8) quarter units of credit, are expected to be academically rigorous and maintain appropriate contact hours while in a condensed format;
- Travel Study Program Directors are required to live in-residence with their programs during the entire duration of the Travel Study Program;
- The International Education Office does not conduct programs in locations with Level 3 (High-Level) State Department, CDC, or other Warnings or Alerts. If a program location receives a State Department Warning or Alert after it has been slated to run, the IEO reserves the right to suspend the program;
- Programs will be assessed for academic, structural, financial and administrative viability. Depending on the complexity of the program, full budgetary and administrative evaluation may take several months to conduct. In rare instances, a program that has received initial approval may be subject to postponement for another summer or cancellation if administrative or financial obstacles become apparent.
- Programs that are cancelled for two consecutive cycles will not be considered in future cycles.
- Contract negotiation with various vendors begins very early in the planning process for all programs. In order to ensure that all program logistics are included in the contracts, full program details must be submitted to IEO staff by September 25, 2023. Please see timeline at the end of this document for reference. Failure to submit these details by the indicated deadlines could lead to cancellation of the program if we are unable to secure bookings in time.

Typical Travel Study programs:

- are 4-5 weeks in duration;
  - include a minimum of 8 quarter units;
  - may include an optional independent study course at the discretion of the program director;
  - combine classroom sessions with excursions related to the academic content;
  - integrate local experts into the classes or excursions;
  - include a graduate teaching assistant for larger programs above 20-25 students, if the budget permits;
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- **Working Regularly with IEO to Develop the Program**

Depending on the complexity of the program, this may require several meetings and follow up discussions. Faculty need to be prepared to make themselves available for program planning discussions as they come up. It is imperative that all program details are submitted to the IEO by indicated deadlines. Please see timeline at the end of this document for reference.
  - **Working with IEO to Advertise the Program**

Marketing for Travel Study programs is not the sole responsibility of the IEO marketing unit. It is a joint effort between IEO staff, faculty, and departments. The vast majority of Travel Study participants indicate that they learned about their program by either hearing about it from the faculty or word of mouth from a past participant. 75% of Travel Study enrollments typically take place in the first two months of registration. We have found that Fall Quarter is the key time period for marketing efforts. While IEO conducts a robust marketing campaign, without earnest and early marketing efforts taking place within the department, programs prove difficult to fill and this can lead to cancellation. Therefore, it is essential that all Travel Study faculty, together with their department SAOs, make time to actively promote programs and to do this throughout Fall and Winter Quarters. Faculty need to work with their respective departments to strategize on a marketing plan. This marketing plan should begin in mid-September or early October. We have found that marketing programs early helps tremendously in driving enrollments.
  - **Responsibility for the Well-Being of Students**

The role of a Travel Study director goes beyond the classroom and requires being on call 24/7. It is primarily the responsibility of the faculty director to handle sensitive issues as they come up while abroad. Students may encounter personal, health or financial difficulties abroad, and faculty need to be prepared to deal with a variety of sensitive issues. For any student encountering severe difficulties or who has violated any aspect of the student code of conduct, faculty are **required** to report those matters to IEO for evaluation and guidance. Trainings on how to deal with violations of the student code of conduct, sexual harassment, sexual assault, as well as other safety concerns related to student well-being are coordinated by IEO for faculty directors.
  - As part of the role as group leader as a primary emergency contact, faculty are required to live in-residence with students with the exception of programs with homestays or those with dormitory housing that include a residential supervision component.

### **Developing a Travel Study Curriculum**

Travel Study programs include a minimum of 8 quarter units in order to be eligible for financial aid. The IEO recommends that departments choose courses that are already an integrated part of the department's curriculum. It is important to consider courses that fulfill major and minor requirements while also having broad appeal to non-majors. The department should also be mindful of whether courses may compete with other summer offerings. If your courses do not already fulfill the Diversity Requirement, it is highly encouraged that you petition for your course to fulfill this requirement.

## **Financial Risks, Responsibilities and Revenue Sharing**

Departments hosting the program assume the financial risk for the program. Budgets are built around a break-even threshold. If a program faces potential deficit, it will require department chair approval for the program to run. IEO staff will contact the chair in January to report updates on enrollments and discuss any possible deficit scenarios. A decision by the chair to cancel a program will need to be made by February 1<sup>st</sup> to allow sufficient time for students to make alternate summer plans and to prevent out-of-pocket losses for students on items such as airplane tickets.

Attrition rates are typically low for Travel Study programs. Our non-refundable deposit requirement and refund policies generally protect against many unexpected drops. However, it is possible for a program to have late cancellations which can put the program at risk for deficit. Currency conversion fluctuations and emergencies abroad can also impact the final reconciliation of the budget. The IEO cannot guarantee that programs will not suffer financial losses.

In the event a program surpasses break-even and generates revenue, that revenue will be distributed to the academic department using the same methodology used for all Summer Sessions revenue sharing.

For an overview of the Summer Sessions revenue sharing process, please visit:

<https://summer.ucla.edu/planning/>

Revenue sharing projections will be provided to departments as soon as possible. Please note that, due to currency exchange fluctuations and costs associated with emergencies abroad, revenue sharing projections are more volatile for Travel Study than regular courses. A finalized revenue sharing report will be available the following January/February. Any revenue is distributed in Spring of the following year.

***\*Due to ongoing campus-wide budgetary restructuring, please note that 2023-24 Revenue Sharing model is subject to change\****

## **Program Budgets and Fees**

Once IEO has worked with the faculty to identify all of the requirements of the program, our office creates a program budget, determines the necessary program fee, and establishes the enrollment breakeven target. The IEO is committed to keeping program fees as low as possible for students. If the IEO feels that a program budget is creating a program fee or enrollment target that is too high, we will make recommendations as to where we might find cost-savings which may include the suggestion of a salary cap or modifying aspects of the program's structure. If cost savings cannot be identified or would compromise the integrity of the program, the program may be subject to postponement for another summer to allow for further review, or cancellation if it is determined that further review would not benefit the program's financial viability.

Vetting of new vendor/partner relationships requires coordination between IEO, Vendor Management, Purchasing, Accounting and the Office of Insurance and Risk Management. There may be circumstances when the University cannot use a faculty director's or department's preferred vendor/partner for the program. Examples include disagreeable contractual clauses, inability of the vendor/partner to accept a payment method acceptable to UCLA, student safety in question due to practices and/or location of the vendor/partner, etc. IEO will notify departments of issues and explore alternate sources for services. IEO partners with established program providers to facilitate emergency support overseas and to manage programs with complex logistics. Partnerships with one provider also facilitate the contract and payment process.

After the program budget and fee are fully established, the financial details are submitted to the Academic Planning and Budget Office and become part of the official Summer Sessions registration and tuition calculation program and the official record for the Financial Aid Office. As a result, it is not possible to change a program fee once it has been finalized.

Any budget revision requests that faculty or department staff would like IEO to consider after a program fee is established will need to be reviewed by IEO staff to determine its overall impact on the financial viability and/or integrity

of the program. IEO staff will consult with department Chairs and MSOs concerning any matters that have significant impact on the program's budget.

### **Compensation**

IEO will begin the budget process with the goal of having faculty compensation follow the same compensation policies (APM 661) for regular Summer Sessions' courses: 8.5% of a faculty member's 9-month annual for each course that is part of the required curriculum and directly taught by faculty. This is based on the lowest nine-month academic annual salary (exclusive of administrative stipends, above-scale payments, staff appointments, or other compensation) in effect June 30 of the summer in which the instructor is teaching. Increases in pay that are effective July 1 or after are not included.

Faculty compensation falls under the purview of the department chair. Some academic departments have summer salary caps or otherwise reduced compensation packages for faculty who teach in summer.

Please note that in some instances, program budgets may not be able to sustain compensation at the full 8.5% per course level. In those cases, IEO will discuss with department chairs and faculty a reduced compensation package with a base salary that increases based on enrollments to allow the program to be financially viable.

Teaching Assistants may be hired for some programs based on program enrollment and as allowable by the program budget. Teaching Assistants are responsible for serving two roles:

- TA role with [stipend according to payroll title](#): Academic instruction and support
- Student Life & Development Specialist role: Accompanying students on excursions, problem solving, arrival/check-in, back-up to program directors for emergencies in student housing

Faculty and TAs cannot earn more than 33% of their annual salary during the summer. Program Directors, Faculty and TAs do not receive an additional stipend to cover the grading of optional 197/199 (Directed Research) independent research papers.

All hiring decisions must be approved by the department chair.

Stipends are paid to Faculty and TAs in one check on:

- August 1, 2024\*

*\* subject to change based on UCPath schedule.*

Faculty and TAs will also receive a flat-rate per diem to help offset the cost of meals and incidentals. The per diem amount is set by the IEO based on program location, duration, and how many meals are included with accommodations. Airfare and accommodations for faculty and TAs are provided by the program.

### **Enrollment Targets**

It is difficult to predict demand for a program. We have found student interest in Travel Study programs often varies from year to year. Even programs that are immensely popular in certain years can face diminished enrollments in others. It is important for departments to be prepared that enrollments may be lower than expected and plan early with the IEO how decisions will be made about the program in the event of low enrollments. Most programs need to meet at least 75% of the enrollment target by late January in order to reach the target by April.

Departments can track real time enrollments beginning November 16<sup>th</sup>.

### **Program Cancellation**

IEO staff will closely communicate with faculty and department chairs if a program is having difficulty reaching sufficient enrollment numbers. If programs aren't on track to reach approximately 75% of the projected breakeven by late

January, department chairs will need to be prepared to make cancellation decisions. Historical enrollment patterns show that enrollments slow down significantly between February and April and a program that is significantly behind by early February is unlikely to catch up even with another surge in marketing. A decision by the chair to cancel a program will need to be made by February 1<sup>st</sup> to allow sufficient time for students to make alternate summer plans and to prevent out-of-pocket losses for students on airplane tickets.

There is no compensation given to teaching personnel in the case that a program should be cancelled. Full refunds will be given to enrolled students (less any non-recoverable costs depending on timing of cancellation).

There may also be situations where problems emerge such as political instability, earthquakes, tropical storms, health epidemics, etc. If a Travel Warning or Alert is issued, the IEO reserves the right to suspend the program. If after extensive consultation with the Program Director, Department Chair, and authorities on the region, it is determined that the program must be cancelled, the International Education Office will give enrolled students full refunds.

Programs that are cancelled for two consecutive cycles will not be considered in future cycles.

## Timeline

- July-October
  - web pages and flyers are created
  - signed Program Guidelines form for *returning* programs due by September 25, 2023
  - program details for *all* programs are due by September 25, 2023
  - contracts with program vendors brokered
  - budget is finalized; fees are set when ready
- October-November
  - UC study abroad fairs
  - promotion to include: departmental info sessions, listserv announcements, partner info sessions
  - class announcements
  - faculty and departments need to actively begin promoting program offerings
  - Global Learning Opportunities Week (GLOW) hosted by IEO mid-late October
- November 16
  - registration for Travel Study opens
  - emails sent throughout UC
  - joint marketing efforts continue between IEO and departments
- November-December
  - targeted email campaigns to various majors
  - joint marketing efforts continue between IEO and departments
  - chairs are updated about enrollment targets
- January-February
  - additional info sessions and targeted emails
  - joint marketing efforts continue between IEO and departments
  - chairs are updated about enrollment targets
  - final enrollment cancellation decisions are made no later than February 1<sup>st</sup>
  - Faculty welcome letters due to IEO upon request
- March
  - Syllabi, pre-departure materials, orientation dates must be submitted to the IEO no later than the first week of April, 2024
  - faculty welcome letter, syllabus and invitation to pre-departure orientation is sent to students
  - registration closes March 22
- April
  - final payment or financial aid application is due
  - final cancellation for student participation (without full-fee responsibility) is April 5, 2024
- April-May
  - pre-departure orientations with students take place
  - IEO workshops on emergency preparedness for faculty and TAs
- May-June
  - pre-departure meetings between IEO and faculty directors take place
  - e-portfolios are shared with program directors prior to departure

**Please review this document and upload a signed copy with your program details form online:**

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Faculty Signature

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Chair Signature

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MSO Signature