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Tips for Successful OCS Seminar Proposals

- **Statement of Purpose**
  - What are the program’s most important academic goals?
  - What are the program’s most important personal development goals?
  - How does this program complement and enrich your department’s curriculum?
  - Why should this subject matter be taught at an international off-campus location?

- **Program Structure**
  - What courses will be offered and who will teach it?
  - What are your program’s main features and how do they support the academic and personal development goals?
  - How will the site and the unstructured time be used -- excursions, homestays, cultural outings, and everyday living--for academic reflection? Will you attempt to assess and/or discuss these cultural experiences in an academic context?

- **Logistics**
  - What type of student might be interested in this program, what class year and majors will it attract?
  - What potential strengths and challenges will this program encounter in student recruitment?
  - What are the program’s participation pre-requisites for students?
  - What are some potential challenges at your program site?
  - What resources and/or partnerships have you identified at your program’s site?
  - Will your interaction with local partners, organizations, and culture be reciprocal in nature? How?

**Approval of your seminar**

A letter from the OCS Director notifies you that the Off-Campus Studies Committee has approved your program. Because of the letter’s brevity, it does not constitute approval of all the details described in your original proposal. Those details will be worked out during the planning process with your department, the OCS staff, and the OCS Committee.

This formal approval of your seminar launches an 18-24 month period when you and the OCS staff work together to plan the seminar, contract needed services, recruit and select students, develop a budget, conduct orientation and pre-departure meetings, implement the seminar itself, and follow through after the seminar. The OCS staff will communicate with you each term to help you plan the necessary activities and actions during those ten weeks.

**Courses and Program Structure**

Carleton off-campus seminars are designed by the faculty director and OCS staff to best fit the curricular needs and goals of the program. This allows for a variety of program structures.

Faculty can choose to teach one, two, or all courses on the program. It is common for stationary programs, such as Paris, Madrid, or London, to have one faculty-taught course and
two courses taught by local instructors. On field research programs, such as Guatemala, Australia Biology, or Studio Art in the South Pacific, Carleton faculty often teach or coordinate all the coursework. Regardless of how many courses faculty director teaches, her/his OCS term counts as a two-course term.

Most OCS seminars are interdisciplinary in nature but some express it most explicitly in their course designations. For example, Psychology in Prague program includes two courses in Psychology (a 6-credit seminar and a 2-credit reading course) one course in Art History, and one in European Studies. Courses offered in departments other than the faculty director’s home department, need to be approved by the appropriate department chair.

As a matter of record, the Registrar should review all academic courses in the seminar – course names, numbers, and credits. The OCS Committee should approve any additional changes in the course listings during a final review.

The faculty director is responsible for submitting grades as on campus. All grade grievances regarding courses taught by local instructors should be directed to the program’s faculty director who is responsible for investigating and resolving the issue.

If courses new to the Carleton curriculum are part of the seminar, these should be described on the New Course Proposal Form, found on the web at https://apps.carleton.edu/campus/registrar/faculty/new_course/. You must submit it to the Registrar. Questions about how courses might fulfill requirements outside of your department should be addressed to Associate Dean George Schuffelton.

**S/CR/NC**

S/CR/NC policies apply to off-campus studies. The seminar director will distribute S/CR/NC cards at the beginning of the seminar and collect them by the published deadline for S/CR/NC declaration (7th Friday of the term), signing off as the instructor for all seminar courses. The seminar director will then notify the Registrar’s Office via email of all S/CR/NC declarations. The seminar director will also deposit the cards with the Registrar’s Office upon arrival back on campus.

**Program Planning Worksheet**

A common “stressor” on a study-abroad program is a real or perceived dissonance between student expectations for the program and the reality of the experience. The questionnaire below is design to help you better define your program and draw stronger connections between program features and the academic and personal goals you have set for the program, the students, and yourself.

1. Program location
   a. Developed country
   b. Developing country
   c. Mostly cities
   d. Mostly field/wilderness/remote locations
   e. Mixed locations
2. Travel to and from program site
   a. Group flight available
b. Independent arrangements

3. Travel documents
   a. Passport required
   b. Visa required – arranged by OCS
   c. Visa required – independent arrangement

4. Travel on the program
   a. Program-arranged multiple trips/excursions
   b. Multiple opportunities for independent travel
   c. Independent travel required (part of program assignments)

5. Language used
   a. English only
   b. Mostly English
   c. Local language and English
   d. Local language only – language pledge

6. Living arrangements
   a. Homestay
   b. Dorm with or without local roommates
   c. Shared apartments
   d. Hotel
   e. Hostel
   f. Camping

7. Food
   a. Group meals
   b. Homestay meals
   c. Independent cooking/meals with a program allowance

8. Coursework (check all that apply)
   a. Mostly classroom-based
   b. Mostly field-based
   c. Carleton instructors only
   d. Local instructors and Carleton instructors
   e. Course structure similar to on campus practice (reading, writing, access to libraries, Internet, etc.)
   f. Please explain how will the program structure differ from on-campus practice
   g. Other coursework features (please explain)

9. Program activities (significant amount)
   a. Walking
   b. Hiking in wilderness
   c. Swimming, snorkeling
   d. Other (please explain)

10. Amount of time spent with the group
    a. Basically, a group program (24/7)
    b. Mix of independent exploration and group activity
    c. Significant amount of independent exploration is encouraged

11. Work with partner organization
    a. Not at all
    b. For logistical support only
    c. As an academic partner and for logistical support
    d. Other (please explain)

12. Your leadership style
    a. Students have little free time. They are expected to account for their free time.
b. Students are expected to closely follow established deadlines, rules, and procedures. They can expect consequences if they fail to do so.
c. Students are expected to follow clearly defined social behavior expectations, including alcohol and drug policies.
d. Students are encouraged to explore the site and the program environment on their own in their free time as much as possible following basic safety guidelines.
e. My responsibility is the program’s academic quality and rigor. Students’ free time is their responsibility.

Based on the answers you provided above, answer the following questions:

1. In forming your group of program participants, which qualities are most important to you (rate these from 1 to 8)?
   a. Academic excellence
   b. Individual accomplishments
   c. Group compatibility
   d. Curiosity
   e. Creativity
   f. Independence
   g. Physical stamina
   h. Compliance with rules
   i. Other (please explain)

2. What are your most important personal development goals?
3. What are your most important academic-focused goals?
4. How do you communicate these goals to students?
5. How do you use unstructured time—excursions, homestays, cultural outings, and everyday living—for academic reflection? Do you attempt to assess and/or discuss this cultural experience in an academic context?
6. How is your leadership style consistent or inconsistent with your program structure and goals?
7. Were you ever faced with student expectations (i.e. complaints of over-scheduling, lack of academic challenge, not enough or too much free time, etc.) not being met and how have you dealt or anticipated dealing with such complaints?
8. Do you believe that “role overload” impacts your teaching? How?

Seminar calendar

Dates
The exact dates of your seminar must be determined by the time students submit their agreement form, so that students can begin making travel arrangements in a timely manner.

Guidelines for seminar calendars as established by the OCS Committee are:
1. Generally, seminars are to be ten weeks in length, or ten weeks minus the last weekend, without the extension of reading days and the exam period that occur on campus. Variations are possible, but should be discussed with the OCS staff. Starting and ending dates need not match the on-campus calendar.
2. The OCS break shall approximate the mid-term break on campus. The recommended length of travel break is 3-5 days.
3. No program funds will be provided for student personal travel during breaks.
4. Students who choose not to travel during the break will have room and board maintained at the program site at College expense, or will receive an equivalent reimbursement.
5. The program will cover the cost of lodging and food during travel days between different program sites.
6. Lodging and food expenses will also be covered during travel associated with field research assignments.
7. When board money is portable (not committed to host families or institutions), that money may be available to travel with students during breaks, at the discretion of the director.

Recruitment and information meetings

**Recruiting schedule**
Generally, Carleton seminars recruit students 2-3 terms ahead of departure. Students’ applications, including interviews, references, and transcripts, are usually due later in the recruiting term. Students are notified about their application before registration begins during the eighth week of the term, two terms prior to departure. That timing enables students to anticipate their off-campus schedule, and to register for courses during the term prior to departure, which may be useful or required for program participation.

**Early recruiting**
Three terms prior to departure may be needed if the seminar is scheduled for spring term, or if it is new and relatively unknown on campus. Under those circumstances there may be another round of applicants during the following term to enable students who were away from campus or who needed additional prerequisites to apply.

**Information meeting**
It is important to discuss your recruitment plans with the OCS staff early in the planning process. You will want to set a date for an Information Meeting, when you describe the program in detail and answer students’ questions. Former program participants, if they are still on campus, are very effective additions to an information meeting, as are slides, videos, or power point visuals of your seminar. Brochures and applications are distributed at these meetings. OCS will advertise your meetings with posters, digital ads and ads in the NNB, and on the OCS and college web calendar. You are encouraged to announce it to classes in your department, on departmental listservs, and to interested students.

**OCS World’s Fair**
Another effective tool for raising awareness of Carleton seminars is the annual OCS Fair held in January. Discuss with OCS staff ways in which your program can be represented and promoted to fair goers, including many first- and second-year students.

**Brochure**
Every seminar is described in a brochure produced by Carleton Publications and the OCS office. The brochure, used during the recruitment phase, includes a colored cover with one photograph and a quote on the cover. The text inside describes the courses, excursions, credits, prerequisites, living arrangements, etc. The cover and text are finalized and sent to a
commercial printer during the summer months one year in advance of the actual seminars. For example, the 2014-2015 seminar brochures are printed during the summer of 2013. That schedule puts the brochures in the hands of faculty, students, and the OCS staff at the beginning of the academic year, during which time recruitment for those programs will occur. That allows students to peruse the upcoming seminar brochures and to discuss them with families and faculty prior to the application phase.

The brochures are produced with the assistance of the Publications Office, so that a consistent and professional Carleton “look” is achieved. The OCS staff will work with you to develop the appropriate text for your brochure. Dates for information meetings about your program and the application deadline should be included in the brochure text.

**Website**

OCS will create a basic website for each program with text from the brochure and a few photos from the OCS library. If directors would like to add additional information, talk to OCS staff. Directors and departmental administrative assistants can also make changes to the program websites. During the program, directors may also post on their website photographs and letters to family members. Sites can serve as blogs or “e-scrapbooks” where students, with appropriate clearance from the faculty director, can post their own photos and OCS stories.

Anyone who produces content for the OCS website or whose personal blog is linked to the OCS website is asked to read and sign the OCS Blog Code of Ethics (see appendix). If content posted to the website violates the code of ethics, the author will be contacted and asked to remove the offending text or images.

**Moodle**

OCS will arrange for a Moodle website to be created for each program. The site serves as the primary communication tool between the students and OCS during the pre-departure phase. OCS posts important general information, meeting times and locations, and program-specific reminders as necessary. Students submit their emergency contact information and travel itinerary through Moodle. The program’s Moodle website has the same functions as regular course Moodle websites, so it can be utilized minimally or as frequently as you see fit.

**Application**

**Selection criteria**

Applications are developed through the OCS Office with the help of the OCS staff. They can serve as another informational tool used to describe the program and your expectations of the participants. The cover sheet outlines the procedures and policies standard to all Carleton seminar applications. You will want to tailor the eligibility requirements, questions, and the reference letters in the application to suit your program. Common eligibility requirements may include faculty recommendations, satisfactory completion of academic prerequisites, GPA, academic and personal reasons for participation, personal qualities (maturity, independence, adaptability, ability to contribute to and engage with the group, willingness to initiate intercultural opportunities, flexibility, ability to deal with stress, a sense of humor, physical stamina), and compliance with College policies.
**Time and deadlines**

The OCS staff has an online draft of your application form, and will send it to you via e-mail for review. Please review it and return it to the OCS office in a timely manner, in order to ensure that applications will be completed and available early in the first term you intend to start recruiting. You may wish to talk with OCS staff about setting a deadline for the application. The deadline is in the brochure, on the application form itself, and on the OCS calendar and web site. Students submit the completed applications and supporting documentation to your administrative assistant, who, in turn, gives them to you.

**Clearance by the Dean of Students**

You or your administrative assistant need to e-mail the OCS staff the names and citizenship of all the applicants for clearance by the Dean of Students. The Dean of Students checks students’ files for disciplinary sanctions, academic probation information, and other relevant information about your applicants. The Dean of Students will contact you directly with any information that may be helpful in your selection process. Feel free to follow up with the Dean, the student, or other staff or faculty about possible red flags.

**Student Health & Counseling Center and Office of Disability services notification**

OCS also shares the names of applicants with the Student Health & Counseling Center, the Office of Disability Services, and the Associate Director of Intercultural and International Life, who may be working with your applicants. While they are bound by confidentiality policies, they can assist both the student and you in making the necessary decisions and accommodations. In some cases the Student Health & Counseling Center staff may advise students to talk with you directly about how study abroad might affect other issues they are dealing with in their lives, or the staff may suggest that a student postpone off-campus studies.

**Student selection and admission**

**The Process**

Enrollment in Carleton seminars is limited to 25 students. Under some circumstances, such as strong programmatic and logistical support from local partners, the number of participants can be increased. If you wish to take more than 25 students you must seek the approval of the OCS Committee.

Directors should send the list of applicants to the OCS office. After an academic check, OCS sends the list to the Dean of Students office. Directors make the decisions on admission with assistance from any others whom they wish to consult. The Dean of Students offers the following advice on the selection process:

> **Academics are central to off-campus programs and judgments on academic ability are central to the process of selection.** "High risk, high maintenance" students might negatively affect a whole group--someone the professor has doubts about, someone who might not be able to handle the stress, someone who is too independent, someone whom no one would room with. How does the faculty director evaluate non-academic traits? Through recommendations and interviews. Faculty have a clear prerogative to make choices that are in the best interests of the program. It is important to have clear eligibility requirements and then follow them.

> **The Dean of Students Office formally checks all applicants and circulates the list to DOS staff for anecdotal information.** Faculty directors may contact the staff in the Dean
of Students Office to discuss concerns or ask additional questions. Faculty can make their decisions on any program-appropriate factors they want as long as they include them in the eligibility criteria and follow a process. Faculty have latitude in making decisions, privileging some students to gain gender balance or minority participation, for example. Talking off the record with other members of the department may be a good idea. If there is another person who can sit in on the interviews, it is helpful to check your impressions with theirs.

In defending decisions, "don't over-explain." When there is competition for limited places, eligibility criteria are more important in making fine distinctions. Students accept rejection more easily when others are turned down. When places remain and a student is not accepted, it feels harder to say "no." The Dean sees judgments on admission not as legal issues but as issues of program management. "Over there, you'll be glad you said 'no'." The Dean advises, "You can be subjective, but not arbitrary." You may be interested in the "best mix," in an interesting combination of experiences and personalities. Faculty can say unapologetically, "I didn't think you were the right person for the group." Period. "Say the least amount." "Sorry, try again next year."

Don't put anyone on the wait list you would not be glad to take on the program. If students come to talk with you about your decision, listen carefully and respond, but don't apologize or over-explain. Stand by your professional decision. You cannot exclude for disabilities (Americans with Disabilities Act).

Notification of accepted, waitlisted, and denied decision

OCS staff is ready to discuss general policies and consult on individual cases, including strategies for waitlist candidates. A list of your decisions – accept, waitlist, and deny – should be e-mailed promptly to OCS staff, so that we can follow up with the OCS acceptance letter and accompanying forms. You may choose to accept some students conditionally, for example, pending satisfactory completion of a required course. In the case of conditional acceptance, the acceptance letter sent by the OCS office should clearly explain all the requirements and conditions, and the deadline by which these should be fulfilled.

You will want to discuss notifying students of acceptance, waitlist, or denial with OCS staff. You may want to e-mail them or send them a personal note, or you may find the OCS acceptance letter sufficient.

Active waitlist

There are almost always changes between admission and commitment, and again between commitment and departure. An active waitlist is essential to full enrollment in your program. If you have a student(s) whom you would like to admit in the case of a vacancy, be sure to keep that student abreast of any changes, so that he/she could be available to participate.

Student commitment to a seminar

Agreement form

The OCS letter of acceptance includes two copies of an agreement form, one of which is considered a legal document, and must be signed and returned to the OCS office during the term prior to departure (or two for spring or summer programs). The second copy students retain for their own records. The policies and fees associated with various seminar withdrawal circumstances are stated on the back of the Agreement Form. Students are
also asked to read and sign the “Participation Policies for Off-Campus Studies” (see appendix).

**Pre-departure information**
When students submit their agreement form to the OCS Office, they are added to the program’s Moodle site which contains important pre-departure resources. Many students have expressed appreciation for having all the seminar materials provided up front. Program-specific materials can be distributed via email, your program website, Moodle or in person during pre-departure meetings.

**Health Assessment forms**
Students also submit a Health Assessment form. This is a confidential document signed by the student, permitting the information to be shared only with the OCS staff, faculty director, and medical personnel on site during a seminar. Once OCS staff has reviewed these forms and made copies for our own files, the originals will be given to you, so that you can reasonably accommodate students’ health needs and respond appropriately to health issues that may arise during the seminar. If you wish, these can be given in an encrypted electronic file. You may also consult directly with the Student Health & Counseling Center about specific issues and concerns.

**Student adds/withdrawals**
When enrollment is set for your program, the OCS office circulates a list of participants to various offices on campus, releasing the student’s housing for the OCS term, and informing the Registrar, Student Financial Services, the Business Office, and others of the student’s intended departures. Please notify OCS staff promptly if a student contacts you directly about withdrawing from the program after this list is circulated. Likewise, the OCS office should be notified of any students added to the program, so that their names can be circulated to the appropriate offices.

**Student pre-departure meetings**

**Meeting agenda and format**
Your brochure, information meeting, interviews, and acceptance letter all help set the stage for the seminar. The pre-departure meetings during the term before the seminar are essential to the successful launch of your program. Issues to be covered include:

- Academic content and expectations of courses and excursions
- Required textbooks, place of purchase (at Carleton Bookstore prior to departure or on site), schedule for readings, particularly directed readings prior to seminar
- Student registration for program; credits; leaves of absence (summer programs)
- Program itinerary and schedule, as found in Fact Sheet
- Travel plans, passports, visas, arrival and departure times, travel logistics
- Health and safety specific to your program site; foreseeable risks; CDC and US State Department information
- Health and immunizations prior to departure
- Health and travel insurance coverage
- Discrimination, sexual harassment and assault, alcohol policy
- Group dynamics and personal conduct
• Homestays and other living arrangements
• Suggestions for packing, money, etc.
• Student-to-student handbook (if applicable)
• Intercultural awareness and sensitivity, culture shock
• Liability during program, student conduct before, during, and after program
• Questions and concerns students may have

Pre-departure meetings vary in format. A half-day retreat off-campus enables students to get to know one another and focus solely on the program preparation. A series of meetings held on campus or your home, with or without food such as pizza or catered from a local restaurant, also works. Discuss your meeting schedule with OCS staff, who may or may not attend, depending on schedules and faculty needs.

Institutional responsibilities
The College is held to a standard of “foreseeability,” that is, providing information and advice on what could reasonably be anticipated in student experiences off-campus. The American College Personnel Association newsletter states:

The institution has 1) a duty to foresee potential harm, and 2) a duty to warn students about risks and suggest strategies to avoid undue risk… where crime is foreseeable, the institution has a ‘duty of care’ to take reasonable precautions to protect students… However, institutions do not compromise valid programmatic goals [i.e. cultural immersion] in order to become the guarantor of students’ safety.

Maintaining permanent records of meeting content and attendance
All advice on risk management emphasizes the importance of maintaining Permanent Records of the information given to students, written and oral. You should circulate and retain sign-up sheets during every pre-departure meeting, retain copies of materials distributed, and keep notes on the information provided during the meetings both on campus and later on site during orientation meetings. The OCS Office will file records on the general pre-departure meetings dealing with homestays and/or health and safety issues. The office will also file copies of any records you maintain of your program-specific meetings.

OCS Safety Guidelines

Prior to departure

OCS Staff and the Faculty Director will:
• Develop contingency plans in the event the director is incapacitated (adult support system on site, alternative instructors, alternative class schedule, program assistant, alumni contacts, etc.).
• Research alternative excursions and field trips in case primary sites are not available, safe, etc.
• Research alternative modes of transportation for excursions.
• During annual faculty directors’ workshop, review emergency response guidelines and procedures.
OCS Staff will:

- Address the standards of conduct that will be expected while on the program, including matters related to alcohol and drug use and sexual misconduct, discrimination, and sexual assault policies.
- Review International SOS Travel Assistance procedures found on the SOS card, safety recommendations, and emergency response guidelines during Health and Safety pre-departure meeting.
- Procure contact and departure information from students, and family contact information, including email addresses.
- Procure electronic scans of each student’s passport; enter passport numbers into the State Department’s STEP online registration site for US travelers; give director set of passport scans via email or uploaded directly onto a flash drive, keep copy of passports on a protected flash drive in OCS Office.
- Give students a hard copy of the program Fact Sheet and upload it to the program’s Moodle site.
- Send a letter to parents with health and safety and other program information via e-mail. Attach the program Fact Sheet.

During the program

Faculty Director should:

- Contact local police to learn about local conditions, precautions, and foreseeable risks; inform students about those issues.
- Review contingency and alternative plans developed during pre-departure to determine feasibility on site; develop new alternatives if needed, and review individual and group evacuation procedures.
- Contact local adult resources, reviewing emergency response procedures for reliable and consistent support; ditto with program assistants, if they are part of the program.
- Rent or buy a cell phone; give students and OCS Office the number; be available 24/7 for emergency calls.
- Review with students the safety recommendations described during pre-departure meetings and use of SOS travel assistance services, reinforce with current, local information, and be sure that students provide to their host family and program director an itinerary and contact information whenever the students travel independently.
- Identify 1-2 mature, responsible students who can serve as program assistants or backup if the director is suddenly incapacitated – to contact the local adult resource, to contact other students, etc.
- Develop and test within the first two weeks a system of rapid communication with the students and staff: a telephone tree, a reliable meeting place, etc.
- Maintain contact with the OCS Office or other Carleton resources, to keep them informed of the program’s emergency contacts, and any concerns or issues that arise.

In the event of an emergency or crisis:

*Students’ health and safety is the primary concern; faculty directors must contact students immediately to make sure they are safe and accounted for.*

- In the event of a medical emergency, the faculty director should call one of the International SOS Travel Assistance Alarm Centers (see contacts section in this
handbook for phone numbers, or the back of your SOS card), see that the student is treated immediately, and contact the OCS Director about subsequent actions, which may include medical evacuation.

- In the event of a natural disaster or civil crisis, the faculty director should contact International SOS Travel Assistance first, and if necessary, the US Embassy or other government official for advice and assistance.
- The OCS Office should contact the State Department and other institutions with programs in the same or nearby location to gather information about recommended action.
- Notify promptly the family or emergency contact persons of any affected student(s).
- The faculty director should confer with the OCS staff, Dean of Students, Dean of the College and others if needed, to determine if the program should be terminated and the students evacuated. If consultation is impossible, the director is authorized to terminate the program and evacuate the students.
- The faculty director should use all resources available through the US State Department, International SOS, and the College to determine the method and timing of evacuation.

**In the event of director’s personal emergency**

The director should contact International SOS and the OCS Office immediately. The OCS staff will work with the director to determine the best action to take for the benefit of the director and the program. If it is necessary for the director to return home, the additional cost incurred becomes a program expense. Furthermore, the OCS office may authorize payment of up to $2,500 to help with other expenses incurred due to the emergency situation. These expenses may include the additional cost of returning the director’s spouse, domestic partner, and dependents, hiring someone at home to act on director’s behalf, additional long distance telephone costs, etc. To qualify for this emergency fund, the emergency must pertain to the director or the director’s immediate family, the director’s primary residence, or some other unforeseen situation that requires the director’s attention.

Request for payment accompanied by expense documentation should be submitted to the OCS Office for approval. Payment from the emergency fund (not director’s personal travel) is defined by the IRS as taxable income to the director, thus subject to federal and state withholding and to social security taxes. The director should discuss the timing of this payroll entry with Barbara Fowler in the Business Office.

**In any event:**

- Establish the safety and well-being of the parties involved.
- Call Carleton College for consultation (see contact information, useful phone numbers).
- Establish a point person back on campus who will help to organize the response and will keep others apprised. Let others know the name of the person through whom all information will be filtered. Help that person make a list of those who have a relationship to the event and those who should be kept informed.
- Start a log.
- Keep a record of everything that happened—what was said to you and also what you did or said in reply. Write down whom you phoned (with telephone number), when, and what was said. Record where you went, when, and what you did in connection with the
case. Retain all written materials from others. Keep this file secure and bring it back to campus for long-term storage.

- Refer media inquiries to your primary contact on campus.
- Consider the needs of the rest of the group.
- In discussion with colleagues at Carleton, if necessary, decide what information other students in the group need and what help may be needed for individuals or for the group as a whole. Provide this or secure help from others.

Pre-departure discussion topics

In addition to site and program specific information, and discussion about the academic expectations, you will want to discuss the following topics during your pre-departure meetings:

Passports and visas

First time applicants for passports must file and sign in person at a county court house or designated post office; renewal by mail is available to those replacing an expired passport which was issued after the age of 16. The OCS Office has passport and visa information. Students can download forms from the web. If students in your group hold passports from other countries, they should check directly with the consulate in the US of the country(s) your program will visit. They should also contact OCS office because an official OCS letter may be required to obtain the visa. All international students must confer with the Associate Director of Intercultural and International Life before departure.

The cost of visa is the responsibility of the student on all programs. Students should contact Student Financial Services about available aid or loans to cover this expense. If OCS is arranging visas for the whole group of students, the visa service fee (if used) and the mailing costs will be covered by the program budget.

Risks to health and safety

All circumstances of life involve risk, and Carleton cannot provide a risk-free environment for students, either on campus or away. As students move from Northfield to the site of their off-campus program, they may put themselves at increased risk for their health and safety. Students need information that describes their circumstances at the program site(s) and what risks may be involved in the seminar or in their personal activities. Your orientation should contain open acknowledgment and discussion of health and safety risks, reviewing the descriptions and advice in the sources below and supplying updated information or warnings.

For description of health and safety conditions abroad, Carleton relies on expert advice from International SOS Travel Assistance, the U.S. State Department, the Centers for Disease Control and Prevention, the World Health Organization, as well as academics and professionals in education abroad, on local affiliates at the program site, and, of course, on your own knowledge of the locale. For assessment of what these mean to an individual, Carleton leaves it to the judgment of the student, in consultation with parents, to consider his/her own level of comfort with these risks and his/her own ability to take actions that might lessen them. Intentional discussions of these topics from your own experience should continue during on-campus orientation and again with knowledgeable locals after arrival at the program site. An open conversation on health and safety provides students with the
information they need when they are ready to hear it, and encourages their consultation with you on concerns they may have during the course of the program.

**Discrimination, sexual harassment, sexual assault**

Off-Campus Studies requires attendance at a health & safety meeting each term for students departing for Carleton-sponsored off-campus study. A Student Health & Counseling Center counselor conducts this session, which addresses ways to maintain mental and physical health and stay safe on off-campus programs. Informational materials on a variety of health and safety topics are also available. Faculty directors are urged to attend the health and safety meeting to have information in common with their students, and to make sure they know that the director is someone with whom they can discuss health and safety matters. A counselor may also be available to attend a program-specific meeting. During program-specific meetings, you should provide training in host country laws, customs, and support resources, all of which you should supply and/or arrange for others to supply on site. You should maintain a record of your orientation sessions on site and of all materials distributed.

**Immunizations and general health**

All medical advice should come from medical practitioners who are trained and insured, and not from you or the OCS staff. A cover letter from the Student Health & Counseling Center with information about immunizations and web links to country-specific travel information is included in the OCS acceptance letter. If requested, Student Health & Counseling Center Staff will meet with your students as a group. They are available to consult privately with you or with individual students on all health matters related to study abroad.

As mentioned in the ‘Discrimination, sexual harassment, sexual assault’ section, the Student Health & Counseling Center and OCS provide a mandatory health and safety meeting every term as part of the pre-departure preparation. That meeting plus your program-specific meetings must address the following topics:

- basic hygiene
- mental health issues
- anxiety and stress
- emergency situations
- altitude sickness
- STDs and HIV
- health care overseas
- personal security
- medical insurance
- emotional problems
- nutrition
- environmental risks
- jet lag
- contraceptive needs
- disease prevention
- immunizations
- medical kits
- eating disorders
- accident prevention
- sexuality issues
- alcohol and drugs
- pre-existing conditions

**Alcohol policy and personal conduct**

When students sign the agreement form (attached to this handbook as an appendix), they acknowledge that living circumstances abroad may require a standard of decorum different from that of Carleton residential life. They confirm their willingness to conform to the standards of their hosts, and recognize your authority to define standards and dismiss participants on the basis of conduct. The Dean of Students “Alcohol Policy and Off-Campus Programs”, available in the On-Site Handbook that you receive before you depart, may help you in setting policy for student conduct at your program site. The Dean of Students welcomes faculty calls to discuss this topic further. In addition, some faculty
directors require students to sign a “basic ground rules” form that outlines expected behavior on-site. A sample can be found in the appendix.

**Travel**

If students have not already made their arrangements for a flight to the program site, they should do so with their own travel agent or on-line. The OCS office can arrange to have a representative from a local travel agency attend an early pre-departure meeting for general advice. The OCS office sells international student ID cards and provides additional travel information about CIEE Work Abroad and Volunteer Abroad, travel books, and other travel-related subjects.

**Homestay**

Your own orientation sessions, both on campus and on site, will also include discussion of homestays, emphasizing site-specific information on living with a family in the circumstances of the host country.

**Insurance for medical evacuation and travelers’ assistance**

Carleton provides insurance for medical evacuation and International SOS travelers’ assistance ([www.internationalsos.com](http://www.internationalsos.com)) for all students/faculty/families on Carleton off-campus programs. This is a supplement to medical insurance, which faculty and students are required to provide on their own. A summary of the coverage is made available at the director’s checkout, or earlier, if requested.

**Student-to-student handbook**

For programs returning regularly to a site abroad, the program hires participants to update student-to-student handbooks with advice about the program site. When you are hiring program assistants, we recommend hiring one student to work on updating the handbook during the program. The student will be paid at the regular student rate for an agreed-upon number of hours and the work must be completed by the end of the term following the seminar and forwarded to the OCS office for the next group.

**Group dynamics**

Group dynamics are an important aspect of off-campus study. “Bonding” as a group begins with the first meetings on campus. It is wise to schedule some meetings that are partly social and provide a comfortable atmosphere—maybe somewhere other than a classroom—where students can talk informally with others in the group. Refreshments, with funds from the program budget, may help students to “mix” and get to know each other.

The staff at Student Activities is very skilled at developing group skills through simulations and games. Talk with Student Activities for ideas about group building that you could use or exercises that you or someone from Student Activities could lead during one of your pre-departure meetings. In addition, a Google search will reveal many good websites that provide background information on stages of group development and tips for facilitating healthy group dynamics. Because positive group dynamics can make your seminar experience so much more enjoyable, we recommend consulting with websites, campus professionals, and your faculty colleagues about strategies for creating a positive group dynamic.
Travel to the program site

Generally, the OCS office does not offer group travel. For most programs, students will leave from various departure points at different times prior to the seminar’s start date. Students may find the best fares through a reliable travel agent or the web. If you wish, the OCS staff can arrange to have a travel agent who can provide general travel information during a pre-departure meeting.

For seminars leaving from Northfield, and/or one that includes country-to-country travel during the program as part of the international round-trip ticket, group travel arrangements may be more cost effective. Talk to the OCS staff with lots of lead-time to plan and implement group travel.

For your own travel plans, you are free to use any agent or service to find the best deal. The program pays for a 90-day round trip ticket between MSP and your program site. You (or your PDA, if appropriate) pay the added cost of extended stays or extended itineraries. Discounted fares on regularly scheduled airlines are available, and prices offered to students may extend to your children, if any, and to you as a faculty program director. Check the OCS Office for international ID cards for faculty and students. The OCS office can put you in touch directly with student-oriented travel agencies or web sites with whom we have worked.

Fact sheet

Fact sheets are a useful summary of on-site contact information, emergency phone numbers and resources for students and parents, and the seminar schedule. The OCS staff creates a draft version for you two terms before departure. The fact sheet is finalized during the term before departure, distributed to students, and mailed to family members.

Faculty directors workshop

Orientation for faculty directors of Carleton off-campus programs takes place at the end of fall term, bringing together faculty directors of off-campus programs with the professional staff on campus who handle student issues in areas outside the classroom. Each year OCS staff, in consultation with previous program directors and deans, plans a three-hour training on both theoretical and practical issues. This session has proven to be very valuable to veteran and novice directors alike, as they discuss policies, procedures, and their own experiences dealing with students 24/7 during an off-campus program.

Budget planning

A balanced budget is required of Carleton seminars. Your seminar has been approved on the assumption that you will recruit enough students to generate adequate funds for the program. You develop your budget in close consultation with OCS staff, and we are held jointly responsible for its accuracy and rationale.

Once your program is approved, a budget is established in which you may charge expenses that arise in the fiscal year preceding the program. Any expenses that occur during the
academic year prior to the year of your seminar should be billed to “[your budget number]-1933.” The “-1933” indicates advanced program expenses. After June 30, the new fiscal year corresponds with the academic year in which your program is offered. You can then use your budget number and omit the “-1933,” since the expenses occur within the current academic and fiscal year. Discuss this with OCS staff or with Barb Fowler in the Business Office.

A proposed budget form will be e-mailed to you for preliminary planning. If you are a first-time director, discuss the categories and budget policies established by the OCS Committee with OCS staff.

Certain categories are set by the College on an annual basis, based on the student comprehensive fee. For budgeting purposes, the rates for 2013-14 are:

<table>
<thead>
<tr>
<th>Category</th>
<th>Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Income per student</td>
<td>$16,400</td>
</tr>
<tr>
<td>Average faculty salary</td>
<td>$46,000 (includes 25% fringe benefits)</td>
</tr>
<tr>
<td>Student work hourly rate</td>
<td>$9.28</td>
</tr>
</tbody>
</table>

Directors of 2014-15 seminars will receive updated rates during winter term 2014. Until then, you should estimate the next year’s rates using this year’s rates plus 4%. Insurance for students on international programs has been added as a program expense at the rate of $25/student.

**Budget accounting**

Accounting expectations for off-campus seminars are the same as for college funds spent on campus or on college-funded faculty travel. Prior to departure, all invoices should be submitted with an invoice or contract letter to the OCS Office or Barb Fowler in the Business Office to arrange for payment. Charges made on the Carleton purchasing card should be matched with receipts and submitted according to the Purchasing card policy. At the pre-departure meeting with Barb Fowler, you will discuss which expenses are still due and how these will be paid.

For funds placed in the care of the director as a cash advance during the off-campus seminar, a later accounting must be furnished with all expenditures recorded and itemized. All expenses of $75 and above must be accompanied by receipts. Statements of expenditure should include amount, date, payee, purpose, and the budget category to which the expense should be assigned. A ledger or a notebook, listing all expenses (accompanied by receipts of $75 or more) is sufficient record for the College and its auditors. Please review useful accounting and qualified program expense tips in the appendix.

**Program income**

The seminar’s income equals the number of participants times the per-student income figure. From this total, one student fee is set aside as the emergency fund, 1) to allow programs to proceed as planned if a student should drop, and/or 2) to provide funds for genuine emergencies, which could not have been foreseen in the planning process.

Note that this entire amount need not be spent. Carleton programs are heavily subsidized by the College. Whatever amount is not spent by your program is used to support the College’s
general expenses from which your students also benefit. You are asked to consider your program needs with those on campus drawing from the same general fund.

**Program expenses (as found in the budget form)**

**Faculty salary**
Directors receive the salary set by their annual contract for the same amount per term off-campus as they receive teaching on campus. The budgets of OCS programs, however, assess each program the average Carleton salary, plus fringe benefits, so that the level of funding among programs within a year, or from one year to the next, does not vary markedly depending on the rank of the faculty director.

**Travel for the director, partner and dependents**
The director’s travel is paid from the program budget - the lowest available 90-day (3 months) airfare for regularly scheduled flights with reasonable connections between MSP and the program site(s). The College expects the director to fly direct, if possible, or with only one change of planes. Faculty wishing to travel with intermediate stops or for a longer stay may apply the amount of the 90-day ticket to the itinerary of their choice.

Your partner’s travel is also paid from program funds. Children of the director’s household are eligible for travel benefit if they are high school students or younger, and will accompany the program or visit during program dates. On the “5+5 week” programs, with each of the two faculty directors present at the program site for five weeks, only half of the partner and dependent travel will be paid from program funds. There is no partner and/or dependent travel subsidy for any program that requires faculty presence on site for less than five weeks.

You can purchase your ticket with the College’s Visa card so that your tickets are paid directly by Carleton, and you receive the $200,000 business travel accident insurance which comes free with the use of this card. If you don’t have a college card, discuss your ticket purchase with OCS staff. Carleton’s insurance covering faculty for medical evacuation extends to accompanying family members.

**Faculty housing**
Carleton pays the cost of housing on off-campus programs. The College provides family housing for the 10 weeks of the program and, if needed, for up to a week of program work before and after the program, for a total of 12 weeks’ rent.

**Local transportation (car policy)**
If a car is rented on site for the duration of the program, Carleton divides the cost in half between the general program budget and the Faculty Fund, as explained in the Faculty Fund policy below. If you receive your Faculty Fund in total as a stipend, you will reimburse the program for half the car costs. Carleton’s liability policy limits collision coverage at only $1,000, so be sure to get collision insurance with the car on site. Here’s a link to the Carleton Business Office’s page on travel: https://apps.carleton.edu/campus/business/AcctPay/travel/
Faculty Fund for program-related expenses

A stipend, based on the cost of living at the program site and the current exchange rate, is paid to the faculty director to assist with the miscellaneous costs of personal absence from Northfield and the daily costs of living abroad. This amount is taxable, as it is considered by the IRS to be income. In cases where two program directors live together, the first $1000 of the faculty fund is divided between them and each receives the variable cost of living adjustment. For example, if the cost of living adjustment is $1500, the couple would receive $1000 for home expenses and $3000 for cost of living expenses for a total of $4000. On the “5+5 week” programs, with each of the two faculty directors present at the program site for five weeks, the Faculty Fund will be split in half between the two directors.

You will receive a memo from OCS staff in the term prior to departure with the exact amount of your stipend, to be included in your final budget. Many of the expenses you incur in living abroad are covered either by the program budget directly or by the Faculty Fund for program-related expenses. Barb Fowler prepares a letter for each director on additional taxable income related to off-campus study payments and benefits. She can clarify the tax implications of the faculty fund and discuss the use of per diems as a tax deduction for meals and incidentals (M&I) expenses. You can find the Department of State Foreign Per Diem Rates at [http://www.state.gov/www/perdiems/index.html](http://www.state.gov/www/perdiems/index.html). Finally, consult with your own tax consultant.

Contract for program services

The OCS office is responsible for maintaining a back-up file of all letters or contracts that commit Carleton to payment and/or suppliers to services for the seminar. You should forward copies of contracts to OCS. We will send you copies of all contracts originating in the OCS office.

Assistants

If you are hiring student workers as resident assistants, program assistants, etc., you should offer all students who have a work contract on campus an opportunity to apply, along with others if you wish. All student work is paid through student payroll from the program budget at the campus rate cited above. Inform OCS of your selection. You must complete the Student Payroll Payment Authorization form ([website](http://webapps.acs.carleton.edu/campus/business/assets/STUDENTPAYROLLPAYMENTAUTH.pdf)), and then send a copy to the Payroll Office and another to Student Financial Services. This must be done before the students leave campus, so that they can specify their deposit of record (bank, tuition account, etc.).

If your seminar includes a graduate program assistant, a position that must be pre-approved by the OCS Committee, you and OCS staff will develop a contractual letter with explicit terms of employment. Please see sample contract letter in the appendix. The program assistant becomes a Carleton staff member during the seminar, and is contracted on the same terms that other staff employed on campus. Graduate assistants are paid a salary based on the expected number of hours worked multiplied by the current Carleton student work rate. This position is hired through the Human Resources Office and paid by Carleton payroll. Please allow time for the assistant to meet with HR before beginning work to complete the required paperwork. Program assistant positions are advertised among qualified candidates and at the discretion of the faculty director in consultation with the OCS
office. Also, professional instructors are paid a salary negotiated with the faculty director in consultation with the OCS office.

If your partner or family member works as a paid assistant during the program, you must discuss the terms of employment with OCS staff. Based on that conversation a contract of service will be created. Payment for this position will be through Carleton payroll.

**Student board (food allowance)**
Program participants are granted a weekly allowance for their food. Directors may disperse that allowance in weekly, bi-weekly or monthly amounts, or OCS staff can arrange for students to receive the entire food and transportation allotment prior to the beginning of the program. Students must sign up for e-checks and deposits will be made during the term prior to departure. Please discuss these options with the OCS staff. Written records must be maintained for all cash disbursements.

You may request a summary of student comments from the most recent program to help you determine a reasonable daily food allowance amount. Or you may confer with your faculty colleague who most recently directed the same or similar program.

An allowance can be budgeted for participation in cultural activities during the program. Examples of cultural activities include individual participation in performances, museum visits, and sporting events not covered by the program. Students need to fill out an OCS Cultural Activities Reimbursement Form (see sample Form at the end of this handbook) and provide receipts for each activity. The faculty director collects the forms and OCS reimburses the students at the end of the seminar or students can receive money up front and account for it after the program. Students need to account for the full amount by submitting receipts (not a visa receipt, but the receipt clearly indicating the concert, class, etc.). The funds not accounted for will be charged back to the student Carleton account. These policies need to be explained to the students during pre-departure meetings.

Gym membership can be purchased for the students at their request. A reasonable amount should be budgeted for all students based on a price comparison of different services available. OCS staff will help research the options available on site. Students can substitute a gym allowance with a dance class. This option can be made available on stationary programs only, such as Madrid, Paris, Prague or London.

**Mid-term break and student expenses**
No program funds are provided for student personal travel during the program or during program breaks. The program will cover the cost of lodging and food during travel days between different program sites or if lodging is not secured at the program site during break. Lodging and food expenses will also be covered during travel associated with field research assignments. The recommended length of program travel break is 3-5 days.

**Transfer of funds and currency exchange**
You and the OCS staff review the final budget figures and send a copy to the Business Office. Then you should meet with: 1) Sophie Pilon in the Business Office for the handling of your own salary, and 2) Barb Fowler in the Business Office about the transfer of program
funds that have not already been paid by Carleton and are not set for future payments from here.

Although currency exchange is usually done after the exact amount of the budget is known, the Business Office will contract earlier for a percentage of the estimated budget if advantageous exchange rates are available. Large amounts of funds are usually contracted through a bank or currency trader and wired to your bank on site. Other methods include:

**Bank account, credit card, ATM card**

A bank account is maintained abroad for programs used repeatedly in the same site. Check with Barb Fowler in the Business Office early in the term to see that your signature is added to the account, and to get the checkbook and the amount of the balance. If you are at a new site, please check with Barb early in the term to open an on-site account for the program.

A credit card can be arranged at your request and may be useful to you for charges before and during your program. This card will be a College purchasing card, which is a Visa credit card. Contact Kara Lloyd in the Business Office to arrange for that card which takes about a week to arrive. A higher credit limit and ATM capabilities will be put on this card during the time it is used for the OCS program. Discuss this with Kara at the time the card is set up. When the card arrives, call the customer service department listed on the back of the card to advise them that the card will be used outside of the United States for a period of time.

Payment for credit card charges will be done automatically from program funds. In planning the money you will take to the program site, remember to estimate an amount to remain at Carleton for payment of the expenses you intend to put on a credit card.

**Traveler’s checks**

Traveler’s checks are becoming almost obsolete with so many other means of getting money but they are useful for some programs. When you meet with Barb Fowler for your financial check out, you can decide on the amount you want to take in traveler’s check and arrange for the purchase. There is usually a fee of 1% of the total purchase charged by the bank although you may personally have a resource for free traveler’s checks. American Express traveler’s checks are available in denominations up to $1,000. If the total amount is over $30,000, or if you require denominations over $100, please check in advance with the bank. Larger denominations may be ordered, allowing a week for delivery. Traveler’s checks may also be available on order in the currency of the country in which you will reside.

**US Customs declaration**

If you will be carrying over $10,000 in cash and/or traveler’s checks, you must complete US Customs form #4790 to declare this amount to the US government upon departure, in addition to whatever declarations might be required in the country of entry. Forms are available in our office and, where applicable, are included in the director’s checkout shortly before you leave.
Other items and actions during the term before departure

Requesting a laptop
A laptop computer and/or printer to take to the program site should be requested of the Academic Computing Coordinator serving your department early in the term before departure, or earlier. Discuss your technology needs with your coordinator who can help you download appropriate software (including software for daily or weekly bookkeeping and budgeting off-campus, the On-site Handbook, etc.) and provide the necessary site-specific connections for modems, etc.

On-Site Handbook
You will receive a Faculty Director’s On-Site Handbook during your checkout session with OCS Staff which contains useful information that you can reference on site, particularly regarding health and safety issues for students. If you would like to review this information before the checkout session, check online https://apps.carleton.edu/curricular/ocs/directors/. Also, if you wish to upload this handbook onto your laptop, again contact the OCS Office in advance of your departure.

Cell phones
A cell phone can be an important tool for the convenience and safety of you and your students during the seminar. For programs in the US, contact Carleton’s Telecommunications early in the term before departure to check out a phone for the duration of the program. For programs abroad where cell phone technology varies widely and is different than many US cell phones, you will find the most appropriate and thrifty cell rentals on site. Consult colleagues who may have preceded you for suggestions about such services. Cell phone expenses are included in the miscellaneous expenses in the program budget.

Course texts and the Carleton Bookstore
Students may purchase their textbooks on campus before departure. It is very important that you submit your textbook order in on time, and that you indicate clearly that the books must be available for purchase before students leave campus for the OCS program.

CPR and First Aid courses
These are available at the Northfield Hospital on a regular schedule. Directors and anyone assisting them may take the courses with the College paying the registration fee. Call the hospital for available times if you are interested.

Student handouts
All handouts provided to students during the term before departure should be sent to the OCS office, both as a file record of your seminar and as a help to students who may ask us for replacements.

Alumni and admissions
OCS staff will supply you with a list of Carleton alumni in the area of your program site at checkout or earlier, if requested. If you would like to make a program event available to alumni or to prospective students, preliminary plans should be made before you leave. For alumni events, alums in the area would be located by the Alumni Affairs Office to publicize the event locally and to collect funds from participants to cover any alumni costs involved.
You provide only the event, yourself, and students participants. The Admissions Office may provide funds for the cost of including prospective students and their families.

**Director’s checkout**

Close to the date of your departure, you and OCS staff will get together for a **checkout session** to review the final details of planning for the seminar, the role of the OCS office during your absence, and the information the office will need to keep in touch with you and your group at all sites during the program.

**On-site with the program**

As faculty director you play a **multitude of roles**, from Dean of the College and Dean of Students, to instructor, counselor, parent, travel agent, ambassador, and intercultural guide. The **On-Site Handbook** has information about the student services side of your job. Common sense, humor, and sheer will power will serve you well. Remember that all the College support services are only as far from you and your students as a long-distance phone call 24/7. **Do not hesitate to call.**

As your program nears its end, you and the students may benefit from some intentional **reflection about the pending transitions**. The entire group, including the faculty director, faces the loss of friendships on site and the dissolution of the group upon return to campus.

The seminar **evaluation form** is one form of reflection, but it does not fulfill the needs of many students and directors to actively and openly reflect on the changes that occur during the term. Ask OCS staff for ideas or consult OCS web page dedicated to returning to campus at [http://apps.carleton.edu/curricular/OCS/planning/returning](http://apps.carleton.edu/curricular/OCS/planning/returning).

**Returning to Carleton College**

1. **Reunion**: You may want to budget an amount for refreshments at a seminar reunion once you and your students are back on campus. Enterprising returnees from your program are excellent resources for setting up the reunion and attending to the details.

2. **Re-entry**: The OCS office offers several re-entry activities for returning students throughout the year. Students may be interested in registering for the intercultural transitions course “I’m a Stranger Here Myself” offered through the Cross-Cultural Studies program, and other courses related to their academic and personal experiences. Carleton also participates in the Minnesota Study Abroad Returnee Conference held each fall at a university in the Twin Cities and hosts at least one reentry-focused meeting/workshop each year.

3. **Financial Report**: Financial Report: A financial report is required to account for the cash advanced and credit card charges during the program. The sooner you do it, the better you will feel but definitely within the IRS guideline of 30 days. All cash or unused traveler’s checks should be returned to the Business Office cashier immediately upon your return. The complete financial report with receipts is turned in to Barb Fowler in the Business Office.
4. **The narrative report**—your description and evaluation of the seminar—is distributed to the Dean of the College and to members of the Off-Campus Studies Committee. Carleton seminars have both academic and extra-curricular goals, and the program report covers these multiple aspects of the student and faculty experience. The report should be both factual and evaluative, written as if the next director of the program (maybe you!) needs to know what happened, what went well, what might be done to make things better.

5. **Closing accounts, credit cards, etc.**: Established bank accounts will not be closed and funds remaining in the account will be charged to the next program once your accounting is complete. If you wish to keep your college purchasing card, please contact Kara Lloyd to have the account number changed to your department and the credit limits reduced to standard levels. If you do not want your credit card, please return it to the Business Office.

6. **Recruitment and orientation meetings** for the next program: If someone other than you directs the next program, that person will be looking for names of students from your group who would be good presenters when the program recruits students again. In addition, the OCS office often needs students to appear on orientation panels for a general audience. Your reunion would also be a time to ask for volunteers for both purposes.

7. **Student-to-student handbook**: For programs returning to the same site every year or two, the OCS office maintains a booklet of practical advice, written by students for students, to help others prepare for and get the most from their experiences at the program site. Topics cover everything from how to get a taxi at the airport to what local students wear when going out.

8. **Faculty director workshops and LTC sessions**: In addition to the training workshop for directors before departure, the OCS office occasionally sponsors workshop meetings at which past directors and future directors of Carleton off-campus seminars talk about topics of mutual interest. OCS also works with the Learning and Teaching Center to co-sponsor discussions about off-campus studies pedagogy, etc. If you have suggestions for productive topics, please discuss them with OCS staff.
Sample Contract Letter for Instructor

Carleton College
One North College Street
Northfield, Minnesota  55057

[date]
[Name, address]

Dear [name of instructor],

I write to confirm your appointment to teach [course name] for the Carleton students [academic term].

Classes will begin on [date] and end [date]. [Adapt the following as needed:] You will be expected to arrange the syllabus, devise assignments and grade student work. You will be meeting the students one day per week (Wednesday morning), and schedule speakers (or tours) for the other class meeting each week.

Your salary for these duties will be [amount].

Would you be so kind as to acknowledge receipt of this letter and send back one signed copy to:

Off-Campus Studies Office
One North College Street
Carleton College
Northfield, MN 55057

I will be arriving in [site, date] and will phone you shortly thereafter. Perhaps we can get together for lunch and talk things over.

I look forward to meeting you and working with you.

Yours truly,

[Name, title]

Signed________________________________________________Date_____________

I accept the terms set forth above.

[Name of instructor] _________________________________  Date ______________
Sample Contract Letter for Program Assistant

Carleton College
One North College Street
Northfield, Minnesota  55057

[date]

Dear [name of program assistant],

This letter will serve as a formal offer and contract letter for a position as a teaching intern and Carleton employee with the [name] Seminar. The period of expected program support begins with your departure from [airport] on the date specified. Your involvement in the program and your contract will be completed approximately 70 days later.

In accordance with federal legislation, your employment is conditional upon providing the College with documentation of your identity and eligibility to work in the United States. A driver's license and social security card, a copy of your birth certificate or a passport will serve to meet this requirement which needs to be completed within your first three days of employment. Please contact the Carleton College Human Resources department to complete the necessary paperwork.

Your responsibilities include working closely with us as directors and occasionally local instructors from [name of program site]. Expected day-to-day support will consist of providing amplification of instructors and student needs with regard to supporting and running the educational program we have outlined in consultation with [program provider on site, if applicable].

BACKGROUND AND SKILLS DESIRED [adapt as needed]
- Strong training in [name of field] with a [name of field] emphasis
- Good at fieldwork and experience doing field-based research
- Good with people and able to organize and support the social needs of the program
- Good in the water; preferably SCUBA trained
- Experience with recording of careful observation by means of writing and drawing
- Effective at laboratory and field research using analytical equipment and a variety of metering devices
- Experience with photography could be useful at times
- Some computer skills (Word, Excel, simple stats)
- Willingness to put first the needs of the program and student participation
- Ability to drive a manual transmission right-hand drive vehicle

Dedication to the successful running of the program and helping students learn as much as possible would be an overriding goal.

Remuneration will consist of the program paying for your round trip air ticket from your home, and following the itinerary of the group flight as specified by our agent. For the duration of the program, the seminar will provide your room and board, and you will participate without cost in all the lecture, travel, site visits, social events – in short, participate in all events offered to students. Carleton will also pay you for [number] hours of work as the program assistant at a rate of $9.28/hour, for a total of [amount]. Additional constraints of this contract include: during midterm breaks you will be on your own for room and board and this program is not benefit eligible.

If the arrangement described and the terms set out above are satisfactory then please sign and send a signed copy back to the OCS Office, Leighton 119. We look forward to having your assistance to the program.

Sincerely,

[Name faculty director]

I accept the terms set forth above.

[Name program assistant]   _________________________________ Date ______________
Agreement Form
CARLETON COLLEGE OFF-CAMPUS STUDY AGREEMENT FORM

Note: Students offered places in Carleton off-campus seminars must confirm their intention to participate by their signature below. One copy is to be retained by the student; ONE COPY IS TO BE RETURNED TO OFF-CAMPUS STUDIES, Leighton 119 by the date set in the letter of admission.

INSURANCE COVERAGE
I understand that Carleton College does not undertake to provide health, accident, disability, hospitalization, personal property, or other insurance to participants in this seminar; I further understand that it is my responsibility to procure health/hospitalization insurance for the duration of the seminar and such other insurance as I require, and that I am responsible for the costs of such insurance and for any expenses not covered by this insurance.

PERSONAL CONDUCT
I understand the rights and responsibilities in the Carleton Student Handbook apply to off-campus study, except that local laws replace Minnesota/U.S. law where applicable. I understand that the living circumstances on off-campus study may require a standard of decorum which differs from that of residential life, and I indicate my willingness to understand and conform to the standards of my host culture. I further understand that it is important to the success of the present program and the continuance of future programs that participants observe standards of conduct that do not compromise Carleton in the eyes of individuals and organizations with which it has relationships. I understand that the Program Director has the authority to: 1) establish rules of conduct necessary for the operation of the program during the entire period of the program, including free time, 2) establish rules of conduct that are stricter than local laws. Student conduct that might disrupt the program, bring it into disrepute, or its participants into jeopardy, will result in penalties up to and including dismissal. This decision, made by the Program Director, in consultation with the Dean of Students, will be final and may result in the loss of academic credit and the loss of program fees. I understand that within the period of this program and after the period of the program, I may elect to travel independently at my own risk and expense. I agree to inform an official representative of Carleton College of my travel plans and understand that neither Carleton College nor its official representatives are responsible for me while I am traveling independently.

WITHDRAWAL OR DISMISSAL
I recognize that, although the credits on the seminar are distributed among courses, the seminar itself is offered as a complete package and there is no provision for crediting any part of the academic work if I do not complete the entire program of required courses. All features of the program, including coursework, home stays, and excursions are considered essential to the program’s academic structure and cannot be changed, omitted, or replaced with a different option. If I withdraw or am dismissed from the seminar, my status at Carleton for that and the succeeding term(s) will be determined by the Dean of Students in accordance with existing policy, as outlined in the Academic Regulations and Procedures Handbook. I have read and understand the statement on the refund policy for Carleton Off-Campus Seminars as stated on the backside of this form.

GENERAL RELEASE
I understand that Carleton College reserves the right to make cancellations, changes or substitutions in cases of emergency or changed conditions or in the general interest of the program. It is further expressly agreed that all programs and use of any and all off-campus programs, services, or facilities shall be undertaken by me at my own sole risk and that Carleton College shall not be liable for any and all claims, demands, injuries, damages, actions, or causes of actions, whatsoever to me or property arising out of or connected with the use of any and all off-campus programs, services, or facilities, whether or not sponsored by Carleton College, or the premises where same are located, whether or not owned or leased by Carleton College, resulting from or related to any and all acts of active or passive negligence on the part of Carleton College and/or its officers, employees, or agents; and I do hereby expressly forever release and discharge Carleton College from any and all claims, demands, injuries, damages, actions, or causes of action, arising from or related to any and all acts of active or passive negligence on the part of Carleton College and/or its officers, employees, or agents.

PARTICIPATION
By my signature below, I indicate my intention to participate in the ____________________________ seminar during ________________ term, 20_____. This commitment to the program both reserves the place offered to me in the seminar and authorizes the College to admit another student for my place on campus during the term I am away. This decision becomes effective on the date of my signature, not later than the date cited in the Letter of Acceptance.

SEVERABILITY CLAUSE
All provisions of the agreement shall be deemed severable. The unenforceability, illegality, or invalidity of any provision or portion thereof shall not affect the enforceability, legality, or validity of any other provisions, all of which will remain valid, binding, and enforceable in accordance with their terms.

Student Name ____________________________ Date of Birth ____________________________

Student Signature ____________________________ Age ____________________________

Parent’s signature is required below if student is under the age of 18

(To be completed by Off-Campus Studies)

Received this ________________ day of ____________________________, 20____, Carleton College, by ____________________________, Director of Off-Campus Studies
Students who withdraw from the Carleton Seminar after the signing of the OFF-CAMPUS STUDY AGREEMENT FORM and before the beginning of the seminar will be required to pay a $500 withdrawal fee plus any costs incurred on their behalf (including, but not limited to, monies advanced on their behalf for non-refundable deposits, tickets, airfare or other travel document, legal documents and fees, housing deposits, etc.). Students withdrawing for documented medical reasons will pay a $500 withdrawal fee only. All withdrawals before the start of the seminar should be made in writing to the Director of Off-Campus Studies at Carleton. Withdrawals after the off-campus seminar has begun should be made in writing to the Faculty Director on site.

Students who withdraw from a seminar in session with the permission of the Director of Off-Campus Studies and/or for documented medical reasons may be eligible for a partial tuition refund according to the standard College policy outlined in the Academic Catalog. Eligibility will be computed from the first day of the seminar abroad, not according to the on-campus calendar.

♦ A refund of 25 percent of tuition will be made if the student withdraws during the first 25 percent of the term; financial aid will be reduced proportionately.
♦ Tuition will be reduced in the case of illness: one-half will be returned if the student withdraws because of illness before the end of the fifth week of the seminar term, after which no fee will be refunded.
♦ No refunds will be made to students suspended or dismissed from a seminar.

If the student withdraws from a seminar to participate in another off-campus study program, the student must apply and receive separate approval for the second program.

If the student withdraws from a seminar and wishes to return to campus, the student may ask the Dean of Students to place his or her name on the space-available list.
1. Off-campus programs for Carleton credit are open to sophomores, juniors, and seniors.

2. Students applying for off-campus study need to be in good academic standing and demonstrate satisfactory progress toward completion of their degree within 12 terms.

3. Students must meet a specific program’s stated requirements (GPA, academic prerequisites, etc.).

4. Applicants for off-campus programs must demonstrate maturity, responsibility, adaptability, willingness to initiate intercultural opportunities, among other traits as defined by the Carleton faculty director or the non-Carleton program.

5. Carleton program participants must attend pre-departure orientation during the term prior to departure. The dates and times of the sessions are available on the program’s Moodle site at the beginning of the term prior to departure. Non-Carleton program participants must attend at least one pre-departure meeting or complete an online activity as described in the petition approval letter.

6. Students on disciplinary probation may not participate in OCS programs.

7. Students on academic probation will be reviewed by the Academic Standing Committee prior to final approval for off-campus studies.

8. Financial aid may apply toward off-campus study with Carleton programs and with ONE approved non-Carleton program.

9. Carleton programs require application submission by the stated deadlines in departmental offices, as defined in the application. Application forms are available at the OCS office and from the faculty directors.

10. Non-Carleton programs require an application submitted by the stated deadline to the program provider and an OCS Petition submitted to the Carleton OCS office no later than the third Thursday of the term prior to the off-campus term. Application forms are available from the program providers. Petitions are available at the OCS office. Late petitions will not be considered. Note: Financial aid is released to ONE non-Carleton program following program approval by OCS.

11. Students may transfer no more than 54 non-Carleton credits from off-campus programs toward their Carleton degree. Note: Programs will not be considered or approved retroactively, that is, during, or after participation in the program.

12. Students who withdraw from a Carleton program are subject to the policy on withdrawal on the program agreement form. Students who withdraw from a non-Carleton program are responsible for informing the program provider and abiding by their withdrawal policies.

13. Off-Campus Studies consults with the Dean of Students office about concerns that may affect students' participation in an OCS program. Information is shared on a need-to-know basis and is limited to the time period immediately before, during, or after the OCS program. Students are encouraged to keep each office informed of any relevant developments in their lives and to share any concerns they have directly with the appropriate office.

14. OCS maintains a list of current students who have participated in OCS programs so that students who are interested in the program may contact you. Your name will be added to the list of students who are willing to be contacted unless you indicate otherwise in writing to the OCS office.

I have read and understood the policies of participation.

_____________________________________________________
Print Name

________________________________________   _____________________________
Signature        Date
Basic Ground Rules (Example)

General Behavior
In Washington, as well as on our trips to Williamsburg and Annapolis, you represent Carleton. Give a good impression of your college. Behave cordially, respectfully, and politely. Be grateful -- it never hurts to say thank you to your hosts at our apartment building and meeting places, to your tour guides, to your program speakers and to other program participants. Be positive and open-minded as you explore new political experiences. Have initiative, be inquisitive. Find a productive role to play within the Carleton group in Washington, and invent ways by which you can contribute to the success of our program. Be supportive and kind to each other. Work on making your term in Washington a lifetime experience.

Communication
Always strive for good communication with any other person associated with our program. If there is a problem or something is unclear, it is your responsibility to speak up, and immediately talk to the person. If the problem seems difficult to solve, address you concerns to the program director as soon as possible.

Tolerance
At all times, program participants must display tolerance for political views with which they personally disagree. Dismissive, disrespectful and intolerant behavior regarding the political views of program speakers and fellow program participants is strictly prohibited.

Academic Work
The Washington program is, first and foremost, an academic program with the same standards expected as in on-campus Carleton courses. You are expected to attend all scheduled events throughout the term. Field trips that are “optional” are clearly designated on the syllabus; they include small group trips to historic locations near DC in which students may elect to participate. All program participants are expected to participate in the Williamsburg and Annapolis field trips. If you know you will have difficulty attending a scheduled event, it is your responsibility to contact the program director in advance about this problem.

Punctuality
It is imperative to be punctual regarding all your classes, field trip departures, and other designated meeting times. **We will not wait for you.** If you miss departure time, you will miss the excursion. If you miss our departure time while we are “on the road,” you will be responsible for returning to our base of operations (residence) on your own.

Safety
- Be careful and reasonable at all times. Do not do anything foolish that could hurt you and/or others. Look out for your safety just as you would in any big city:
  - Avoid deserted areas
  - Protect your valuables
  - It is best to have money in different pockets. Do not put your wallet in an obvious spot from where it can be easily taken (just like in any major city, beware of pickpockets)
  - Make sure not to flash money, be discreet
  - At all times, carry the phone numbers of the director and the apartment building where we are staying
  - If you are out late, return home safely with other members of the program or take a taxi
  - Always inform the faculty director and/or Program Assistant before you leave for travel on a non-group day or weekend trip. Provide information to your PA and the director about your destination and your time of return.

I have read and understood all the rules explained on this page.

__________________________________
Name

__________________________________ ______________________
Signature Date

30
Al Montero’s Seven Deadly Sins

1. Physical assault and battery; accosting colleagues or local citizens.
2. Theft or wanton destruction of the property of others.
3. Sexual misconduct – harassment, psychological and/or physical abuse.
4. Abuse of controlled substances involving threats to the safety of oneself or others.
5. Disruption of the community in which the program is housed, involving disturbance of neighbors or the peace within the house, especially to the level of threatening the program’s comity and continuation. Note: rumor-mongering will be singled out as a pervasive threat upon being detected.
6. Academic misconduct – plagiarism and other violations of College ethics as defined by Carleton College; non-cooperation in collaborative research, habitual tardiness or absence from program-related coursework or activities.
7. Sustained disappearance and non-communication at any point during the program.

Carleton in Paris 2012 – Cathy Yandell
“The Social and Linguistic Contract”

During the Paris program, you are not only a single agent – you represent Carleton AND the United States (as well as other countries of origin in our group). Your words and actions reflect not only on you, but on the entire group, the College, and your country/countries of origin.

GRATITUDE AND TOLERANCE
Gratitude is probably the single most important thing to practice while living abroad (and maybe while living anywhere!). The program is being hosted by CUPA (Center for University Programs Abroad) – they are sharing their space with us -- and you are being accepted into a French family. Saying thank you frequently, offering to help, and being respectful of others (including members of the Carleton group) are all ways to manifest your gratitude. “Suspend judgment” makes a terrific mantra. You will see and experience things that are different to you in France. If, rather than judge these differences, you try to understand, to look at the situation from another point of view, and to be tolerant, you might be surprised by what you learn.

ACADEMICS
Though your workload will probably not be as heavy as it is at Carleton, this is primarily an academic program. You will be learning constantly through living in French, and also through doing research in libraries that will be required for the lit/culture and art history classes. You should plan in advance to miss no classes during the program except in case of illness.

VISITS FROM FAMILY OR FRIENDS; TEXTING, SKYPING AND CALLING THE U.S.
If your family or friends plan to visit, ask them to delay their visits – if at all possible -- until the end of the program. Such visits inevitably interrupt your French learning curve and take you away from what you’re in Paris to do. Also, if you spend all your free time texting, emailing, Skyping or calling friends in the U.S., you might as well not be in Paris! Limiting communication in English – for just this one term – and living in French will increase your linguistic ability and your cultural understanding exponentially.

PUNCTUALITY
It is imperative to be on time for ALL activities of the program: classes, visits, lectures, shows, celebrations. It may take longer than you imagine to get across the city, so leave early. If you are late for the theater or other spectacles, the ushers may not let you in for part or all of the show. If you miss a bus or a train, it could be difficult to join the group.

SAFETY
• Exercise caution in Paris, as you would in any big city.
• While the violent crime rate in France is extremely low, there are many incidences of pickpocketing in tourist areas and on the metro. Keep your valuables close at hand at all times (NOT in your backpack behind you).
COMMUNICATION
It is our commitment to keep the lines of communication open. If a problem emerges or if something is unclear, please communicate as soon as possible with the person in question (CUPA staff, professors, or other students). The Director (Cathy) and the T.A. (Isabel) will also be available for discussion throughout the term.

TAKE THE INITIATIVE
This is your experience – make it the trip of a lifetime!

*     *     *

I have read and understood this “contract.” I agree to speak ONLY French while on the premises at CUPA (except in dire circumstances), and to speak French on other occasions as much as possible.

___________________________________
Name

___________________________________
Signature      Date

Blogger’s Code of Ethics

Guidelines and ethical standards for OCS blogging
Note: These guidelines apply to official OCS program blogs, the OCS website, and OCS affiliate blogs/sites (personal blogs/sites that OCS lists as being sources of news & information about the program)
August 2008

Carleton College Blogging Guidelines
Blogging is a public activity. What an individual writes reflects upon him or herself, the off campus studies program, and Carleton College. While OCS encourages candid reflections on students’ experiences, we also expect them to:
• keep in mind the cultural norms and standards of the people and places written about, taking care not to post photographs of people (especially children) without their expressed consent;
• remember that whatever is published on-line can be accessed by anyone, including host families, professors, employers, parents, friends, sources, subjects, and so on;
• for the sake of everyone’s safety, refrain from publishing specific itineraries online in any form, including program fact sheets and details of individual travel plans;
• adhere to the following code of ethics, as published by CyberJournalist.com: http://www.cyberjournalist.net/news/000215.php

A BLOGGER’S CODE OF ETHICS
Be Honest and Fair
Bloggers should be honest and fair in gathering, reporting and interpreting information. Bloggers should:
• Never plagiarize.
• Identify and link to sources whenever feasible. The public is entitled to as much information as possible on sources’ reliability.
• Make certain that Weblog entries, quotations, headlines, photos and all other content do not misrepresent. They should not oversimplify or highlight incidents out of context.
• Never distort the content of photos without disclosing what has been changed. Image enhancement is only acceptable for technical clarity. Label montages and photo illustrations.
• Never publish information they know is inaccurate -- and if publishing questionable information, make it clear it's in doubt.
• Distinguish between advocacy, commentary and factual information. Even advocacy writing and commentary should not misrepresent fact or context.
• Distinguish factual information and commentary from advertising and shun hybrids that blur the lines between the two.

**Minimize Harm**
Ethical bloggers treat sources and subjects as human beings deserving of respect.
Bloggers should:
• Show compassion for those who may be affected adversely by Weblog content. Use special sensitivity when dealing with children and inexperienced sources or subjects.
• Be sensitive when seeking or using interviews or photographs of those affected by tragedy or grief.
• Recognize that gathering and reporting information may cause harm or discomfort.

Pursuit of information is not a license for arrogance.
• Recognize that private people have a greater right to control information about themselves than do public officials and others who seek power, influence or attention. Only an overriding public need can justify intrusion into anyone's privacy.
• Show good taste. Avoid pandering to lurid curiosity.

Be cautious about identifying juvenile suspects, victims of sex crimes and criminal suspects before the formal filing of charges.

**Be Accountable**
Bloggers should:
• Admit mistakes and correct them promptly.
• Explain each Weblog's mission and invite dialogue with the public over its content and the bloggers' conduct.
• Disclose conflicts of interest, affiliations, activities and personal agendas.
• Deny favored treatment to advertisers and special interests and resist their pressure to influence content. When exceptions are made, disclose them fully to readers.
• Be wary of sources offering information for favors. When accepting such information, disclose the favors.
• Expose unethical practices of other bloggers.
• Abide by the same high standards to which they hold others.

I agree to abide by the Carleton OCS blogging guidelines and the bloggers code of ethics when posting material regarding the OCS program (including text, images, video, etc.) to the OCS website, the program blog or my personal affiliate blog/site.

<table>
<thead>
<tr>
<th>Printed name</th>
<th>Signature</th>
<th>Date</th>
</tr>
</thead>
</table>
Accounting for advances and cash withdrawals while directing OCS program

WHY:
Funds in bank accounts on which you are a signer, cash advances to you, and cash withdrawals on the Carleton purchasing card are treated by the IRS as advances to you personally. Unaccounted for advances are considered personal income. With the IRS, items are taxable unless proven otherwise. So, the burden of proof is on us – you. According to a recent edition of the NACUBO Business Officer magazine, IRS agents are being trained to audit higher education. Advances of any type are vulnerable and OCS program advances are particularly so due to their size.

WHAT: ALL CASH …
1. Funds in foreign bank accounts on which you are a signer. That is calculated as:
   Beginning balance + additions – ending balance.
2. Cash advances from the Carleton P-card.
3. Cash or traveler checks advanced
4. Refunds from students, vendors, etc. on site.

CARLETON PURCHASING CARD charges must be accounted for separately with ALL receipts detailing the charges. Reconciliation of credit card charges is expected while you are on the program if you have internet access. Login to www.paymentnet.com to review your charges, make changes in the account number for non-program expenses, and document the business purpose of the expense. At the same time collect the receipts related to those charges. Cash advances should be reconciled and added to your total of cash to be accounted for at the end of the program.

HOW:
Suggestions:
1. daily ledger supported by organized receipts to enable verification
2. envelopes for cash expenditure receipts and a separate envelope for credit card receipts
3. Excel spreadsheet: enables adding without errors, sorting by category, additional column for future commitments. Most students know excel; hire a student to enter the daily ledger into excel.

Keep all receipts until recorded; may discard an individual receipt of less than $75 although it does not hurt to keep as many receipts as possible.

Ledger should be kept in foreign currency and then converted to dollars at the end.

** Emphasis is on accounting for cash, credit card charges, or checks written on site not on budget categories or total program accounting.

WHO:
Personal and/or dependent expenses should not be paid with program funds.
If dependent expenses are paid for as part of group i.e., theater tickets, admissions, clearly show the reimbursement for the dependent/personal expenses.

YOU – are responsible for submitting accounting for funds controlled by you.

WHEN:
All cash or unspent traveler checks should be returned to the Business Office immediately upon your return.

According to the IRS, advances must be accounted for within 30 days of incurring the expense or within a reasonable period of time. Accounting within 30 days of the end of the program would be reasonable. Completing the accounting gets harder every day it is delayed. Sooner is better and easier.

BF 11/08 revised 3/10
### OCS Director’s Personal or Program Expenses

<table>
<thead>
<tr>
<th>Type of Expense</th>
<th>College Paid Program expense</th>
<th>Director’s Personal expense *</th>
</tr>
</thead>
<tbody>
<tr>
<td>Books and materials kept by Director</td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Books and materials purchased to be returned to Department or Library</td>
<td>Dept./Library expense</td>
<td></td>
</tr>
<tr>
<td>Cell phone on site</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Child care or educational expenses for dependents</td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Clothing, luggage, health&amp;beauty supplies, personal food</td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Director's meal when accompanying students, visitors, program instructors: Per College policy, one alcoholic beverage per person may be expensed.</td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Director's meals during Break or other personal time</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Gym fees</td>
<td></td>
<td>X (taxable income)</td>
</tr>
<tr>
<td>Housing</td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Housing supplies ie. small appliances, linens if director keeps</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Housing supplies ie. small appliances, linens if left at apt.</td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Local transportation during Break or other personal time</td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Local transportation when accompanying students or on program business</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Medical expenses on site and physical, immunizations or special medications required to travel to site.</td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Parking or driving tickets; car repairs due to negligent use</td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Passport and visa fees for Director</td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Phone expenses related to planning program or being on site in excess of regular Plan (documented)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Rental vehicle if required for program (review with OCS Office first; see detailed policy below)</td>
<td>Documented business use</td>
<td>Personal use and/or undocumented use</td>
</tr>
<tr>
<td>Round-Trip airfare for Director</td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Round-Trip airfare for partner, dependents (taxable to Director but college pays taxes)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>All other expenses related to dependents’ accompanying: meals, transportation passes, tickets, etc.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tickets/admissions during Break or other personal time</td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Tickets/admissions when accompanying students</td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Travel during Break</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Additional expenses incurred at home related to being away, ie. shoveling or mowing, boarding pets, additional personal phone expense, higher cost of food on site, etc.</td>
<td></td>
<td>X</td>
</tr>
</tbody>
</table>

* Sources of payment for some of these expenses is the OCS Faculty Fund or the Faculty Development Account. Expenses charged to the FDA must meet the guidelines for eligible expenses.

*Last updated by B Fowler: 10/23/2013*
Car rental policy for OCS directors on-site
The need for a rental car for the director’s use on-site must be discussed with OCS as part of the budget process. The IRS assumes that a rental car, including associated fuel costs, is a personal expense and therefore taxable to the director unless the business purpose is documented. Documentation required is a mileage log with miles driven, purpose, and date for all business travel. Possible scenarios:

<table>
<thead>
<tr>
<th>OCS Approved</th>
<th>Documentation</th>
<th>Program expense</th>
<th>Reportable on W2</th>
</tr>
</thead>
<tbody>
<tr>
<td>No</td>
<td>None</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>Yes</td>
<td>None</td>
<td>Yes</td>
<td>Entire portion reportable</td>
</tr>
<tr>
<td>Yes, if Documented Business Purpose</td>
<td>Yes</td>
<td>Director responsible for personal % of use</td>
<td>No</td>
</tr>
<tr>
<td>Yes</td>
<td>Yes</td>
<td>Entire amount</td>
<td>Personal and/or undocumented portion reportable</td>
</tr>
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</table>

If a rental car expense is approved by OCS, all drivers must submit a Motor Vehicle Waiver form prior to travel to become an approved driver. Additional training is required to drive 7 – 12 passenger vans. Collision and liability insurance should be purchased with the rental on site. The director is responsible for tickets or fines incurred during use of the car. Repair costs due to driver negligence are also the director’s responsibility.
Cultural Activities/Gym Money
Berlin Program
Fall 2013

As a student on this program, you will receive an allowance to participate in cultural activities that deepen your understanding of German language and culture and allow you to buy a membership in a local gym or take an exercise class (aerobics, yoga, dance, martial arts, horseback riding, etc.). Activities may include plays, concerts, movies (in German), exhibits, museums, cultural heritage sites, sporting events, and so on. You may also use your cultural money to sign up for German cooking, music, or other enrichment classes while in Berlin. Please use good judgment in your choice of activities and check with Prof Leonhard if you have any doubts; we reserve the right to not reimburse students for activities that are not in keeping with the spirit of the fund. Each student can spend up to €200 on cultural activities, and €150 on gym.

You will receive €100 of the cultural activities money before the program with your food and transportation stipend and, if spent, the other half will be deposited into your bank account from Carleton after the program. You need to account for the FULL amount of €200. This means that you need to submit receipts (not a visa receipt, but the receipt clearly indicating the concert, class, etc.) to Prof Leonhard by the end of the program. The funds not accounted for will be charged back to your Carleton account.

Questions may be addressed to Naomi Ziegler in Off-Campus Studies (nziegler@carleton.edu) or to Professor Leonhard.

EXAMPLE:

<table>
<thead>
<tr>
<th>Date</th>
<th>Activity</th>
<th>Description</th>
<th>Amount</th>
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<tbody>
<tr>
<td>April 2</td>
<td>German Movie</td>
<td></td>
<td>€10</td>
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<tr>
<td>April 1-May 15</td>
<td>Cooking classes</td>
<td>Learn how to make bread &amp; other German pastries</td>
<td>€75.25</td>
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</tbody>
</table>

I hereby certify that the expenses below were incurred by me and that I am not claiming reimbursement from other sources for the same.

Signature: _____________________________________ Date: ____________

Name: _______________________ Student ID #: ____________
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<th>Description</th>
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Total in Euros

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