



## ***Off-Campus Activity & Travel Guide***

### **General Overview .....**

Before planning for any off-campus activity that includes travel or transportation of any kind – faculty and staff leaders and all student groups, student organizations, and their advisors – should follow the off-campus travel processes outlined in this ***Off-Campus Activity & Travel Guide***.

There are specific planning details and timelines required for various travel – from field trips, day trips, weekend excursions, spring break trips, to international experiences. These communication and planning processes have been established so that Concordia is informed on all travel plans and trip leaders are well prepared in case of personal or group emergencies.

The ***Off-Campus Activity & Travel Guide***, along with additional and most recent ***Travel Resources***, are available from the Director of Global Opportunities and online at the ***CUNE Travel Management site***:

<http://travelmanagement.cune.edu>

### **Examples of Off-Campus Activity & Travel .....**

**There are a number of curricular or co-curricular off-campus activities and travel experiences that would be considered Concordia University events.**

**These are off-campus experiences that involve CU employees/students/alumni/guests and that:**

- 1) have originated through a CU office, department, team, or student organization, or
- 2) uses money budgeted by or received by CU, or
- 3) includes participation and/or leadership of CU faculty/staff as part of their CU responsibilities, or
- 4) have students recruited by CU faculty/staff to participate in their off-campus programs, or
- 5) have Concordia's name connected to the event in any way.

**Off-campus activities and travel experiences include:**

- 1) Mission or service project trips,
- 2) Domestic or international study tours or classes or alumni trips,
- 3) Student organization trips/events,
- 4) Organization or class day trips or field trips,
- 5) Music tours, athletic trips, or speech tournaments,
- 6) Field experiences or observations,
- 7) Student teaching,
- 8) Practicum and internship experiences,
- 9) Summer or semester study abroad experiences.

If you are involved in any of these experiences (as leader, program director, etc.) please review this information for guidelines and requirements before planning for any travel experience. If you have led groups before, please don't assume "before" is still the current process.

**CUNE administrators need to have information** on proposed off-campus activities or travel experiences – **early on in the process** – in order to:

- provide leaders with guidelines and resources to aid them in their planning and initiating of these experiences, thereby providing students with positive, well-planned, well-led, and safe learning opportunities,
- ensure that consistent campus guidelines are followed for these opportunities,
- ensure that adequate financial and insurance coverage has been arranged,
- ensure that risk and crisis management protocols are understood and followed during an event or activity,
- have access to information on proposed locations, activities, and participants involved in case of crisis or emergency situations.

## **Types of Travel and Documentation Needed .....**

Specific procedures, details, and resources are available for leaders in this **Off-Campus Activity & Travel Guide** and in **Faculty/Staff Resources** and **General Travel Resources** available online at the **CUNE Travel Management site**: <http://travelmanagement.cune.edu>

See **Appendix A** for a short summary of common off-campus activities and travel situations, along with a listing of campus processes needed for those situations.

## **Trip Leadership .....**

If you are a leader for any type of off-campus travel experience, **please use this Off-Campus Activities & Travel Guide** and other resources under **Faculty/Staff Resources** and **General Travel Resources** provided online at: <http://travelmanagement.cune.edu> for processes specific to the travel experience. Please review what you should provide to students involved in the experience and what information needs to be communicated to the University.

Even though the designated leader is responsible for following the campus procedures for the travel activity they are leading – ultimately the campus administrative leadership – Athletic Directors, Activities Directors, Deans, Department Chairs – are responsible for making sure all faculty, staff, advisors, and coaches under their supervision are aware of the campus processes for leading these off-campus activities. Any questions on this administrative responsibility can be directed to the Director of Risk Management.

### **Leadership for any group travel experiences:**

- Should be two deep – there should be at least one other adult leader or adult participant along besides the primary group leader.
- If the traveling group is a single gender, one of the leaders should be of that same gender.
- All leaders must be at least 21 years old and the primary group leader must be employed by Concordia University.
- Leaders must be willing and able to take full responsibility for the group for the duration of the experience or activity.

Because trip leaders are to be fully responsible for the group members on behalf of Concordia – family members under 19 years of age should not accompany a group travel experience. The exception would be if children were college students registered for the class or part of the team or group.

## **Planning and Communication .....**

**As a first step**, please share potential travel plans with the appropriate campus administrators (department chair, cabinet member, director of global opportunities). This way, any questions or issues can be addressed as soon as possible in the process.

Complete the appropriate **Proposed Trip Plan** and **Trip Funding Plan** at: <http://travelmanagement.cune.edu> so your anticipated trip can be communicated early on to key campus administrators.

- **Domestic trips** – at least 4 months prior to trip date (if a trip budget template is needed by the Accounting, Finances, and Operations (AFO) office – due by May budget deadline)
- **International trips** – at least 12 months prior to trip date (due by May budget deadline so the AFO office can generate a budget template)

Once campus administrators review and approve the plan, advertising the trip or recruiting students for the experience can take place.

Make sure your information/communication is at least “2 deep” as well – that you –

- are not the only person with crucial contact information –
- have communicated your plan to department chair, administration, etc. –
- have provided participants and parents with trip itinerary and emergency contact information –
- have given requested information to the University throughout the planning process.

Please follow the specific **Leader Check List** for the tasks and processes outlined for domestic or international trips.

Please over-plan for a trip and over-communicate with the University, participants, parents, and the trip site. Follow through on all processes along the way, including trip registration for participants and **Final Trip Details**.

## **Financial Responsibilities** .....

**Campus process:** A **Proposed Trip Plan** and **Trip Funding Plan** should be completed each spring to share anticipated trip and budgetary plans and verify that adequate funds are being anticipated for a travel activity. The AFO office will then provide an account (if needed) for a trip.

**Contracts:** Any experience which requires a signed contract which stipulates financial obligations for Concordia to pay another entity or organization for services must be approved by and contract signed by Concordia’s CFO/COO. Any contracts should be sent to the Director of Risk Management for review – contracts will then be sent on for approval and signatures.

**Fundraising:** Any anticipated on-campus or off-campus fundraising needs to be approved by the Institutional Advancement Office. This office can make sure the same individuals or businesses are not being approached by multiple Concordia groups for support. See the **Fundraising Guidelines** section for more details.

**Personal financial obligations:** Participants need to know from the beginning their personal and financial responsibility once they commit to participate in a trip. The **Assumption of Risk and Participation Agreement** communicates each participant’s obligation to cover their trip cost (air fare and other pre-purchased travel expenses) even if they do not take part in the trip.

**Self-sustaining budget:** Travel expenses must be self-sustaining (from participant fees/costs) without use of general budget support. If enough funds are not raised and additional revenue is needed, it cannot be assumed the University or a campus organization will cover the cost for an individual or group travel experience that goes over budget. Therefore, all revenue needs to be in place and available prior to trip departure. Any exceptions to this must be arranged directly with the AFO office.

**Campus accounts:** It is the trip leader’s responsibility to keep track of account balances (with deposits and expenses) to make sure the trip is on budget. There may be two types of accounts created depending on deposits collected, fundraising done, or gifts received so communicate with the AFO office on what type of FOAPAL or gift accounts they will need to set up.

**Mission grants:** Check with the Director of Global Opportunities to see if your experiences could benefit from special financial resources available for leaders and participants of mission trips.

## Fundraising Guidelines .....

*These guidelines are intended to help student groups determine how to do fundraising for domestic or international mission trips, service trips, etc. The group planning a trip, along with their leader or faculty advisor can choose **which option** best meets their needs.*

**Prior to any fundraising efforts, the trip leader or faculty advisor must connect with the Institutional Advancement office.**

Any requests for outside funds, gifts in kind, donations from the community or other financial support, must be proposed by the trip leader or faculty advisor then approved in advance by the Institutional Advancement Office. This is to assure all fundraising activities promote Christian stewardship, reflect and promote the mission of CUNE, do not overburden certain university donors, and are compliance with IRS rules for charitable giving.

Be prepared to share the following information:

- Group/Entity proposing the fundraising activity
- Proposed fundraising activity (activity/location/audience/date)
- Fundraising activity will be on-campus or off-campus
- Anticipated amount to be raised through this fundraising activity
- Who/how many will benefit from the proceeds
- How the activity will be publicized
- Will goods/services be exchanged for a donation
- If yes, what portion of donation is for goods and services

### **Option 1: Fund-raising for the individual**

In this option students ask friends, relatives and congregations, to support them for a special activity (i.e. mission, athletic, music, etc.). The funds raised are in **support of that particular student**. For example, if the cost of a trip is \$1,000 per participant and Student A raises \$600 while Student B raises \$750, the out of pocket cost for Student A is \$400, for Student B it is \$250. **Donors in this case know exactly who their money is supporting.**

Gifts like this are considered gifts to the individual student, not to Concordia. Per IRS guidelines, they are *not* tax-deductible.

Gifts received from this type of fundraising effort can be 1) taken to the **Student Financial Services Office** and deposited into the student's account for use for the trip or 2) used by the student to pay for various trip expenses through their personal checking account.

### **Option 2: Fund-raising for the group**

In this option, students ask friends, relatives and congregation to support a group activity. All dollars raised go into a pool of funds to be used to **support all members of the group equally**. If Student A raises \$2,000 and Student B raises \$500, a total of \$2,500 has been raised for the whole group. **Donors in this case are providing funds that will be put into a pool with other funds received.**

Gifts to non-profit organizations are tax-deductible because they are not linked to an individual. These types of gifts are gifts to Concordia.

Gifts received from this type of fundraising effort should be taken to the **Institutional Advancement Office** for processing as gifts to the institution. They will set up a specific gift fund for the trip. They will also issue a receipt to the donor to be used for tax purposes.

## Risk Management .....

Accidents, medical emergencies, natural disasters, or crisis situations may not be common occurrences – but they can take place anytime and anywhere. By having off-campus activity and travel procedures in place, **the goal is to help protect students, faculty, staff, and Concordia from any reasonably foreseeable harm.**

**Be prepared:** Leaders of off-campus trips must be prepared with their travel plans – as well as prepared to respond to emergency situations that could occur. Please be diligent in considering the “what if’s” – the situations that might occur at the location or with the activities planned. **If the risk is too great to be mitigated – some activities (or even trips) may need to be changed.**

**Travel management site:** Concordia uses an online process to handle travel management - which also helps with travel risk management oversight. **CUNE Travel Management** at <http://travelmanagement.cune.edu> provides a central location to find travel planning resources, input information on proposed trips, and gather participant information for any campus trips. There is a small per person charge for participant registrations for trips. Campus administrators are able to access all trip and participant information online more effectively. All international trips and overnight domestic trips must use this site to gather participant information.

**Proposed Trip Plans:** All **Proposed Trip Plans** are reviewed by the Director of Risk Management to check for any risk related issues, and shared with the LCMS Risk Management office, if needed, to make sure additional excursions or certain activities can be covered by Concordia’s supplemental insurance. **Be aware that some activities** (like scuba diving, snorkeling, hang gliding, swimming with sharks, etc.) **may be considered too high risk to be covered and would need to be eliminated from anticipated activities.**

**Assumption of risk statements:** If a trip is overnight and includes out of town travel, *Assumption of Risk and Participation Agreement / Release and Hold Harmless / Waiver of Liability* statements must be read and signed online by all participants to verify their understanding of the responsibilities and risks involved in travel and that particular experience. Minors (students under age 19) should print off and share statements with their parents.

**Medical information:** All travel participants should provide their **Health & Medical Information** and **Emergency Contact** information. Program leaders should carry this information in case of a medical emergency with a program participant. Parents/guardians of minors (students under age 19) must co-sign for their child to consent to medical and dental care.

**Insurance coverage:** All trip participants must have current medical coverage since any additional trip insurance that might be included for a trip would be supplemental only.

**International insurance coverage:** International travel experiences must have supplemental medical emergency/evacuation insurance coverage for all participants. See the Director of Global Opportunities for details on using *iNext* to provide low cost supplemental international coverage for each participant. Through CUNE’s affiliation with *iNext*, participants receive a discount per person with one invoice billed to the campus. Concordia requires coverage for a low cost per person per day (10 day minimum coverage) with Political/Natural Disaster coverage added. Individuals can “upgrade” to include trip cancelation at their own expense.

**Special accommodations:** It is important to consider and review emergency medical procedures, mental health resources, and ADA accommodations (if needed by particular students) prior to departing for another location. Contact the campus ADA Coordinator and the Counseling Center for suggestions and guidelines that might be needed for student participants. Some mental health hotlines are listed in the campus ***Crisis Management Guide for Off-Campus Activities & Travel Abroad.***

**Campus contact:** The University’s Director of Risk Management serves as Concordia’s main contact for risk management. He can help with any questions or concerns about risk management or insurance issues connected to planned off-campus travel experiences. See the ***Emergency Contact Information*** provided in Appendix C for University contact information.

## Crisis Response .....

The Director of Risk Management also serves as the lead campus contact for any emergency crisis situation where communication or coordination with the campus is needed.

### Situations warranting notifying Concordia include:

- Death or serious injury to any group members
- Serious illness or hospitalization of any group members
- Vehicle accidents with damage or injuries
- Situations causing personal, physical, or emotional duress to an individual or the group
- Natural disasters or civil unrest (report in on group’s status)
- Terrorist attacks in country (report in on group’s status)
- Situations needing legal counsel
- A trip leader is incapacitated

**Situations and responses:** Detailed crisis management situations and responses are listed in CUNE’s *Crisis Management Guide for Off-Campus Activities & Travel Abroad*. Be sure to read and review this document prior to your trip. Contact the Director of Risk Management if you have any questions on crisis processes and procedures.

**Use good judgment:** If other challenging situations occur – consider – “would I need to explain my decisions or actions later” when deciding whether something warrants campus notification or not. Use good judgement and error on the side of caution and good communication.

**In the event of an emergency:** If there is an emergency where Concordia needs to be informed of any critical situations – the group leader should use the *Emergency Contact Information* provided in *Appendix C*.

**Media requests:** If a group or group member is involved in an emergency situation where media requests a response – forward any media requests to the Director of Risk Management.

## Student Life Considerations .....

Even though trips and travel experiences take place off-campus they are still considered Concordia activities and all students and leaders are expected to abide by Concordia Student, Faculty, Staff Handbooks.

Off-campus travel experiences often present participants with the chance to confront new or different realities, cultures, or situations. Leaders need to anticipate these new or different experiences and prepare group participants for these experiences.

Leaders should take time during trip meetings and orientations to review and discuss:

- Campus and student expectations
- Local culture and customs
- Staying healthy and safe
- Any risks or hazards in the experience
- Group covenant for how the group will live and work together
- Abiding by local laws and expectations
- Maintaining student in good standing status

If you have questions on any student life considerations for your particular trip, please visit with the VP for Student Affairs and Athletics or the Director of Global Opportunities.

## Appendix A ~ Trip Documentation & Communication .....

### Field Trips / Class Trips

- Field trip leader has student participant and destination contact information
- Leader provides field trip info (see *Field Trip/Day Trip Process*) and list of students for excused absences (email to Arts & Sciences Administrative Assistant)
- Leader notifies main crisis contact in case of an emergency situation

#### Documentation needed:

- Field Trip Notice (email)
- *Use of Personal Vehicles* (if used) on file in HR
- *Emergency Contact–Participant List* carried by leader

### Sports Events

- Coach has emergency contact & medical information for all team members (and away campus contact information)
- Athletic Office has team rosters and the same away campus contact information
- Coach contacts Athletic Director & main crisis contact in case of an emergency situation

#### Documentation needed:

- Athletic office and coaches have team rosters
- Emergency contact & medical information carried by coaches

### Field Experiences / Student Teaching / Practicum Experiences / Internships / Study Abroad Experiences

- Program director has student and agency contact information
- Student (or agency) contacts program director if there is an emergency situation
- Program director informs main crisis contact if emergency warrants

#### Documentation needed:

- Student and agency contact information on file with specific department/program
- *Use of Personal Vehicles* form on file in HR

### Student Organization Day Trips / Local Trips

- Advisor has student participant and destination contact information
- Students notify advisor if there is an emergency situation
- Advisor informs main crisis contact if emergency warrants

#### Documentation needed:

- *Emergency Contact–Participant List* carried by leader
- *Use of Personal Vehicles* (if used) on file in HR

### Domestic Overnight Trips / Study Tours / Choir Trips / Student Organization Trips

- Leader has student participant and travel/destination contact information
- Leader notifies main crisis contact in case of an emergency situation

#### Documentation needed:

- ***Proposed Trip Plan*** and ***Trip Funding Plan*** and ***Final Trip Details*** completed
- All participants complete registration on CUNE Travel Management site

**For detailed guidance, follow *Leader Check List – Domestic Travel***

### International Mission Trips / Study Tours / Musical Tours / Alumni Trips

- Leader of trip has participant and travel contact information
- Leader notifies main crisis contact in case of an emergency situation

#### Documentation needed:

- ***Proposed Trip Plan*** and ***Trip Funding Plan*** and ***Final Trip Details*** completed
- All participants complete registration on CUNE Travel Management site

**For detailed guidance, follow *Leader Check List – International Travel***

## Appendix B ~ International Trips and Travel .....

International experiences include many additional details to consider. There is a process and specific information requested for international experiences so planning well in advance of an anticipated trip is the best plan.

Please meet with Julie Johnston Hermann, Director of Global Opportunities, early on if you would like to lead an international trip. She is available to discuss ideas, options, timelines, resources, and best practices with anyone interested in leading an international experience.

Please meet with Kirby Klappenback, Director of Risk Management, if you have questions on contracts, potential risks, or other concerns on a trip you are considering.

### Things to consider in getting started ...

- **Determine the purpose of an international trip ...**
  - Will the trip provide a high impact educational experience for students to investigate cultures, life experiences, and worldviews different from their own?
  - Does the trip fit with the campus mission of preparing students for lives of service, learning, and leadership?
- **Other questions to ask ...**
  - Will it do no harm to people in at-risk or impoverished communities?
  - Is there potential for continued partnerships and return experiences vs. a one and done experience?
  - Does it add to a student's educational experience vs. provide travel adventures for a leader?
  - Would the location and activity be safe?
  - Can students be mentored to serve in key leadership responsibility areas?

### Who should you communicate with during the decision making process ...

- Please discuss international travel plans with your department, department chair, director, or group advisor to make sure the activity fits the purpose and focus of the department or group.
- Please check to make sure dates work for students and campus – international travel should take place during campus breaks only.
- Check with the Director of Global Opportunities to see if there are other international activities planned for the same time frame that might be pulling from the same groups – that could be good or bad.
- There are people who can be helpful and offices who need to know about international plans – share info!

### As you are planning ...

- **Plan ahead** – students need time to raise funds for international travel – more than just a few months.
- **Check on funding sources** that might be helpful to support leaders, students, projects.
  - There may be limited grants available for international mission opportunities (leaders of student mission trips can apply for the Romans 1:16 endowment, students can apply for an Acts 1:8 Students in Mission grant)
  - Students may be able to use funds left in their student accounts for academic courses happening in December or May.
  - Thrivent members could apply for a Thrivent Action Team grant for \$250 toward a fundraiser or educational materials
- The **Leader Planning Check List** provides step by step reminders on what needs to happen in planning an international experience.
- Processes are always being reviewed and additional resources are always being added – **always check for the most recent information available.**

### After an international experience ...

- Reflect on what went well – what needs to change
- Share resources that might be helpful for others
- Share your story to encourage others to become involved in global opportunities



