Dear Faculty Director or Program Administrator,

Thank you for your commitment in planning your special sessions program. We know that special session development, programming, and administration are tremendous endeavors for all involved. USC Dornsife is fortunate to have dedicated educators who are willing to invest their time and resources to carry out a special session program for USC students. These special programs enrich all of our lives and highlight the breadth of USC Dornsife.

Please know that there is an entire university support system that must be coordinated to bring your program to fruition. We are working with the Dean’s Office, the Curriculum Office, the Strategic and Global Initiatives Office, the Budget Planning Office, the Provost Office, the Dornsife Faculty Affairs Office, the Dornsife Business Office including budget, procurement, and payroll teams, the Registration Office, Legal and Treasury Services, Business Services including Disbursement Control and Travel Management, Insurance, and Student Affairs office. There are many outside connections and networks as well: universities or programs abroad, your special speakers, the travel agencies or hotels that you align with to make these programs and excursions possible. It all has to come together to create one “special session”. Since so many hands touch these programs, we would like to emphasize the importance of planning in advance. This gives each department sufficient time to process requests.

Please use this procedure manual as you plan your programs. While we have compiled this information, it by no means takes ownership of your programs. They belong to you and your department. You are not only the Faculty and Administrators, you are the managers (and program coordinators, travel agents, international experts, counselors, etc.) This ensures our students are receiving a study experience that is special, creative and unique to your Department, Dornsife and USC and not getting a generic cookie cutter travel abroad experience.

**FIGHT ON!!**

**Academic Programs Team**
OVERVIEW

Phase I. Approvals

- Initial Program Inquiry & Proposal – Schedule & Staffing February
- Deans Memo August 15th Confirm and Changes
- Schedule a meeting with Wendy Pedersen for Budget
- Univ. Committee on Curriculum - New and Review (every 5 years)
- Role and Responsibility for Department Administrators and Program Directors

Phase II. Set-up

- Budget Approval - & Assoc. Dean Cody (Department)
- Marketing (Department)
- Student Applications and Processing (Department)
- Program Registration Set-Up (Department)
- Contracts/MOI’s for Special Sessions

Phase III. Ongoing Pre-Session

- Student Acceptance – (Department)
  - Program Deposit - $400
- Managing the Finances
  - Business Services
- Program Forms – (Department)
  - Student Required Forms
  - Department Forms

Phase IV. During your Special Session

- Keeping Track of Finances

Phase V. Post Special Session

- Settling Expenses
- Qualtrix Evaluations (required by Curriculum)
- Director’s Report, Dean’s Memo; Evaluations Summary
PHASES IN DETAIL:

Phase I. Approvals (Internal)

- **Initial Program Inquiry** – Contact Deans Office, Associate Dean Jane Cody via Wendy Pedersen.
  - Initial program inquiry and proposal to be presented by Department Chair at Schedule and Staffing meeting in February of the year prior to program dates.
  
    - **Schedule and Staffing Plan**
      - New off-campus courses are proposed and approved as part of the regular Schedule and Staffing process for the upcoming academic year, e.g. Fall 2018, Spring 2019 and Summer 2019.
      - Off-campus courses that have been offered previously are also approved for the Schedule of Classes as part of the Schedule and Staffing process. They may/may not require separate renewal by the University Committee on Curriculum. Review and renewal occur every 3-5 years.
      - All special session courses require additional approval by the University Committee on Curriculum via Curriculog. Details for submission or program review renewal may be found here: [http://arr.usc.edu/services/curriculum/ospforms.html](http://arr.usc.edu/services/curriculum/ospforms.html).

- **Types of Programs**
  - **Maymester Programs** are included in the spring Schedule of Classes. Dates are set by the Registrar’s Office and are not flexible, e.g. all Maymester grades must be finalized by June 21st in spring 2018. Thus, submissions should adhere to the deadlines set for spring semester.
  
    - **Problems Without Passports** courses address a complex societal problem that exists on a trans-national scale. The instructor presents the problem to students, providing them with valuable context. Then through the independent identification of verified academic
resources and evidence, students report their findings and work collaboratively to develop possible policy strategies aimed at solving or managing the problem. The instructor, fellow students, and local experts will then evaluate the students’ work. These courses are delivered throughout the summer sessions. The department sets these dates. Submissions must adhere to the deadlines for summer.

- Other special offerings include Spring Break (two units and travels during spring break) and Block Semester (set of courses given in blocks of 3.5 weeks each during the semester).
- All courses must follow the official academic deadlines and due dates of the semester in which they are offered.

- **Full Proposals** to Dean Stott and Associate Dean Cody
  
  - Any changes to the earlier proposal should be made by August 15th to Associate Dean Jane Cody by Department Chair at jmcody@usc.edu and adap@dornsife.usc.edu.

- **Program Budget & Training** *(Schedule a meeting with Wendy Pedersen to help with proposal budget, if needed).*
  
  - For the Program Director and Department Administrator:
    - All directors and administrators for these courses (or appropriate designees) must attend the Dornsife Global Special Sessions Training in fall and the Health and Safety Training Session in spring offered by Dornsife Academic Programs, hosted by Wendy Pedersen.
    - These courses require a special session number that Dean Cody’s office will provide.
      - Please send set-up information to Wendy Pedersen at 740-8085 or cook@usc.edu to request new session number with the USC registrar.
    - Each course must have a budget approved by Assoc. Dean Cody’s office (on budget templates provided by her office) before the class has final approval to be offered on the official Schedule of Classes.
- **OSP Curriculum Process**
  - New courses with an overseas component are submitted via the 17-18 Course New approval process in Curriculog. These courses will be recorded in SIS CATALOG as well as USC Catalogue.
  - There is a new approval process in Curriculog through your department administration. OSP Syllabus Template and Curriculum forms found here: [http://arr.usc.edu/services/curriculum/resources.html](http://arr.usc.edu/services/curriculum/resources.html)
  - Courses, with revision to catalogue information as well as the overseas component, should be submitted via the 17-18 Course Curriculog process.
    - Revise approval process in Curriculog through Department Administration.
  - Special Topics courses and existing courses adding a new location, but not changing any catalogue information, are submitted via the 17-18 Short Trips approval process in Curriculog.
  - Special Topics course must also be submitted via Kuali for scheduling
  - All previously approved courses up for review are submitted via the 17-18 Short Trips Review approval process in Curriculog.
    - An OSP Student Evaluation form must be attached along with other required review materials. Please contact Wendy Pedersen for link to electronic evaluations.
    - More information here: [http://arr.usc.edu/services/curriculum/ospforms.html](http://arr.usc.edu/services/curriculum/ospforms.html)

- **Univ. Committee on Curriculum** (Report - 501 or 502) – New and Review (every 2-3 years)
  - Roles and Responsibilities of the Program Director and Department Administrator:
    - 501 Form
      - 501 Forms are used for all off-campus studies international or semester programs longer than two weeks. This includes both new international summer programs (ISPs) and those up for full review.
    - 502 Form (has two categories: new and review)
      - 502 Form should be used to propose a new international trip of two weeks or less.
• 502R Form should be used to request a review for international trips of two weeks or less.

• The Recruitment and Enrollment Process
  o All directors will be responsible for the timely submission of materials; course information, photos and flyers for the Dornsife College web site.
  o Materials should also be posted by the department of program.
  o Directors are responsible for: hosting tables at the Study Abroad Fair, distributing flyers, and for offering informational sessions for students interested in their programs.
  o Courses may be cancelled due to under-enrollment. The final date for adding/dropping a class will be the latest date at which a program may be canceled. Enrollment should be monitored carefully as that date approaches.
  o Some classes may be cancelled prior to the final add/drop date if the enrollment clearly is insufficient.
  o Special sessions timelines and forms may be found here: https://dornsife.usc.edu/short-term-programs-process/.

Phase II. Set-up

Budgeting for Special Session Programs

For USC Dornsife Special Session programs, each organizing Resident Director and Department will submit a standard budget worksheet electronically to Wendy Pedersen to be approved by Assoc. Dean Cody’s office.

There will be 3 scheduled budget reviews and approvals needed:
  1) Initial program approval
  2) Upon student acceptance with initial student numbers
  3) Two weeks prior to program with the final student numbers

This is your budget.

Budget Submissions

Review the budgets that are submitted to Academic Programs office to make sure that all your expenses are included. Except for emergencies and
special circumstances, **there should not be any major changes in the initial program budget approval** that does not relate to student numbers or exchange rate fluctuations. There is an understanding that if student numbers increase, the budget will also increase. If student numbers decrease, the budget will also decreased. Programs failing to meet the budget net set by Academic Program office will only be approved to “go” by the authorization of CFO Ito and Assoc. Dean Cody or Dean Stott. If the net is low, look for ways to cut costs.

Planning in advance will aid in keeping expenses down to the best rates available. The estimated future exchange rates that are used for budgeting are given by the Treasury Office, which will consult with its banking contacts.

For budgeting templates and worksheets, please visit: [https://dornsife.usc.edu/short-term-programs-process/](https://dornsife.usc.edu/short-term-programs-process/).

**Compensation**

- **Director’s Stipend (TT and NTT)** –
  - $1,500 for PWPs and Maymester directors
  - $6,000 for departmental summer programs

- **USC Instruction-Per-Course summer rate**
  - Tenure Track (TT)
    - Maymester – Part of annual load
    - PWP/Summer -- 1/9 of ABR up to $8,500 ($8,000 minimum) for 3- or 4- unit course; $4,250 ($4,000 minimum) for 1- or 2- unit course
  - Non-Tenure Track (NTT)
    - Overload at $8,000 per course rate

- **Student Employees** – Not allowed to travel with the program
  - Exceptions made by approval of Dean Cody or Dean Lamy
  - Must be budgeted

**Per Diem**

1st year of a program each Faculty and Staff will need to settle with actual receipts in order to set rate for the program abroad. For the 2nd year, upon
approval by Assoc. Dean Cody’s office, a per diem rate can be set and maintained.

Once your budget is set, there is no changing it. Do not buy something while abroad and expect us to approve it if it is not on the budget. We will only approve such items in the event of an emergency or special consideration approved by Assoc. by Assoc. Dean Cody or Vice-Dean Lamy.

**Student Charges in Budget**
We cover program fees, in-country travel & excursions, and event meals. We do not cover housing, hotel, daily/personal meals, airfare to country, or international visas.

**Marketing Overview**
- Web Marketing Details
- Inform Advisors About Your Program
- Overseas Study Abroad Fair Fall/Spring

**Web Marketing Details**
Here are the *necessary* items for web marketing for your special session programs:

- Photos
  - All photos must be high resolution!
- Program Details
  - Course description
  - Dates and locations
  - Estimated costs
  - Application deadlines, procedures and paperwork
  - Contact information

Here are the *optional* items for web marketing for your special session programs:

- Course syllabus
- Relevant links to blogs, articles, etc.
- Student testimonials (from past sessions)
For additional support, contact Wendy Pedersen (cook@usc.edu).

**Inform Advisors**

Inform department advisors and college academic counselors who work with your target student population about your special session program.

**Overseas Study Abroad Fair Fall/Spring**

Set up an information booth at both the Fall 2017 and Spring 2018 study abroad fairs.

**Student Applications and Processing**

This process is left up to the department. If you would like a help with a general application, see Wendy Pedersen (cook@usc.edu).

**Student Financial Worksheet**

The Global Programs and Financial Aid offices on campus created a template for student finances abroad that is to be used for our programs. These worksheets give students an idea of the total cost for each program. Please have these ready upon your first budget approval for Assoc. Dean Cody. These worksheets will be used to help market your program. They will be attached to the program flyer in the Overseas Studies office and may be online with your program information. If your program is a spring semester or summer program, having these worksheets ready before the winter break will give students time to plan their study experience.

**Special Session Program Registration**

Use the special session set-up form with registration. Set your session up as early as possible. For these programs, the Dornsife Business office has created special income accounts. If you do not know your income account, Wendy Pedersen will assist you. If you find that you have put the wrong
income account number on your special session registration, please inform Wendy Pedersen.

**Program Registration Set-Up:**
- Maymester Courses Session Codes
  - Domestic: 185
  - International: 088

**PWP/Summer Courses Session Codes:**
- Returning programs use and request the same session code
- New programs must request a session code
  - Request session code here: https://esdweb.esd.usc.edu/nonstandardsessionrequest/
- Enter Course into Kuali

Once your students start registering, remember to check and make sure all your students are registered. When a student doesn’t register, it gives us a hint that they may be preparing to withdraw.

**Contracts**

Appropriate contracts are created and maintained to protect and clarify any commitments made by and in relation to other institutions, buildings, programs and excursions abroad. All contracts must have the Global and Strategic Vice-President Anthony Bailey’s approval. Departments should never sign contracts without his consultation.

**Contract Process:**
- The Resident Director and University, institution, or program organization create contract.
- Each contract is sent to Academic Programs Office (Contact: Wendy Pedersen). It is then reviewed and the department and/or Jane Cody/Steve Lamy offer the first round of edits on the document.
- Stephen Yamaguchi (USC legal) and Matthew Erskine (Global Initiatives) will then review this version of the contract, determine final changes and offer their approval.
• Once approved by Stephen Yamaguchi and Matthew Erskine, it is sent back to the program for edits and signatures.
• This signed copy should obtain Jane Cody (summer)/or Steve Lamy’s (other) approval by email.
• The edited original will go to the Dean (Amber Miller) for signature via Sherri Sammon with a copy of email approval of Steve Yamaguchi, Matthew Erskine, and Jane Cody or Steve Lamy.
• After the Deans signature, the documents are sent to Matthew Erskine at VKC for logging and Anthony Bailey’s university signature.
• Global Initiatives will contact Dornsife when the contract is ready for pick-up.
• Copies should be kept and maintained by department and organization. PDF copies are okay.

Phase III. Ongoing Pre-Session

Deposits

Each special session program requires a $400 commitment deposit that is non-refundable in case of withdrawal. This is for the benefit of both the Department and Dornsife. These deposits solidify the commitment of the student to your program, covering staff time expended on each student. Fee exceptions are granted on a case by case basis.

Departments should submit the student billing excel sheet which includes a list of names (first and last) and student numbers for their programs to Wendy Pedersen cook@usc.edu and include Rosemary Byrd @ bydr@usc.edu. The $400 deposits will be billed directly to the students’ account through SIS. We are no longer accepting checks for this deposit. The $400 deposit will be refunded upon program start date and applied to their USC billing account. We have created a deposit acknowledgement form for the students to ensure they are aware of and responsible for this $400 deposit upon acceptance to the program.

Student Billing

Some programs have student charges that cannot be left for the student to pay upon arrival: housing, airfare, etc. If you are purchasing group housing
or a group flight in order to keep the program cohesive, let Wendy Pedersen know and she will arrange to have the expenses added to the student’s bill. It is our preference to bill the students before paying the vendor.

**FORMS**

- **“Know Before You Go”**
  - Includes informed consent
  - Offers recommendations for a healthy study abroad
  - Asks for pre-departure check-ups
  - Asks for students to list medications and any/all different abilities

- **How to Help Your Students Fill it Out**
  - Acknowledge the “Know Before You Go” form in class
  - Explain potential issues and provide steps to avoid these issues, including immunizations, medications to bring abroad, or pre-travel consultations with a physician or a mental health professional.
  - Please consult with Office of Students with Disabilities, if applicable.
  - Keep signed copies of forms in department

- **Travel Release**
  - Acknowledgement of student responsibilities while abroad
  - Acknowledgement that USC assumes no responsibility for various issues (it’s a long list) from travel to weather to acts of God, war, injury, etc.
  - Acknowledgement of insurance coverage and release of USC from any liability
  - Agreement of student to follow all rules, regulations, and laws of the country in which he or she is studying, and that violation may result in expulsion from program
  - Agreement of student to fully participate in all parts of the program
  - Agreement of student to not leave the program/country on pain of termination of relationship with USC
- Acknowledgement that USC can cancel the program at any time for various reasons (see above partial list)
- Acknowledgement of good standing and no criminal history or prior charges

- Medical Treatment Authorization
  - Acknowledgement that student is a willing participant in the program
  - Acknowledgement that student understands his or her financial responsibility for injury or medical treatment while overseas
  - Authorization USC to act on student’s behalf if unable to self-authorize treatment
  - Understanding that authorization does not create a duty for USC to cover any costs, liabilities, claims, losses, etc., that students may incur because of medical care overseas
  - Keep signed copies of forms in department

- Refund Policies
  - If the external institution has a stricter refund policy, USC holds that the stricter policy applies.
  - Clearly indicate cancellation fees by date
  - Clearly explain cancellation process
  - Include signature page with policies
  - Student must keep policies
  - Department keeps signature page (photocopy for student if requested)
  - Commitment Fee & Withdrawal Acknowledgement
  - Acknowledgement that student will be charged $400 commitment fee that is fully refundable as long as student participates in the program
  - Acknowledgement that the $400 fee will not be refunded if student withdraws from the program
  - Keep signed copies of forms in department

Faculty Forms
- Health Center Overseas Spreadsheet
• Send to Valerie Hill (vhill@engemann.usc.edu) at least a month prior to travel
• Include USC ID, Student Name, Gender, Date of Birth, Arrival in Country (could be prior to program), Departure back to US (could be after program), Destination, Insurance Name
• Students waiving insurance now must go online to do so. The process has changed where Valerie must verify every student’s insurance.

• Student Affairs Overseas Roster Spreadsheet
• Send to Jessica Frank (jliebert@usc.edu) at least 2 weeks prior to departure—fully populated.

• Student information:
  ▪ Full Name, ID #, Major, Gender, Country, Passport #, Academic level, Email address, USC address, phone number, dates of departure and return

• Program information:
  ▪ Department, location of program, name of institution, program type, term, program coordinator name, coordinator USC phone # and email, faculty sponsor name/email/phone #
  ▪ On campus information: contact person, email, phone #
  ▪ On site information: contact person, email, phone #
  ▪ Overseas contact information for each student: address, city/state/post code, phone #
  ▪ Health insurance and emergency contact: provider name, dates covered, contact name, address, phone #, email

• Keep a copy in department

**Special Sessions Payment Processing**

**Administrator Expenses**

• Administrator expenses (lodging, meals, travel, and incidentals) must be separated from program related costs.
• Per Diem requests for lodging and meals must be approved prior to the administration of the program.
Incidental expenses such as taxi, fees, baggage, mail, and internet are not considered as part of per diem. All possible reimbursements must be approved by the department.

Payments for professional services may not be made directly from the Administrator to the Service Provider. This is considered a Third Party Payment and not reimbursable. Please see Honorarium Payments for proper procedure.

**Receipts for Purchases**
- Receipts are required for all reimbursement and advance settlement claims.
- A Missing Receipt Declaration is required for expenses not supported by a receipt or where the receipt has been lost.
- Receipts in foreign currency must be converted to US Currency using Oanda.com as the basis for the conversion rate.

**Payments to Universities for Tuition and Program Fees**
- Contracts are required for Tuition and Program Fee payments.
- Tuition expenses require Vice Presidential approval prior to payment request in Kuali via Disbursement Voucher.
- The roster of participants must be included for all tuition payments.
- Program fees to administer program do not require Vice Presidential approval for payment via Kuali Disbursement Voucher.
- Payment requests for Universities must include the full address, contact email, and US Federal Tax ID (if it is a US Institution).

**Website for Procedures:** [http://dornsife.usc.edu/off-campus-programs-process/](http://dornsife.usc.edu/off-campus-programs-process/)

**Phase IV. During your Special Session**

**Keeping track of expenditures**
- Receipts pile up quickly. Please keep daily records.
- We’ve provided you with a spreadsheet that will help you stay on budget while abroad
Phase V. Post Special Session

Qualtrics Evaluations (required by curriculum)

- Settle expenses within 10 days of return from program (please refer to Business Office Procedures in Phase II).
- Qualtrics Evaluations (required by Curriculum):
  - These forms are different from those administered by the university overall. All off-campus studies programs, international and domestic, must provide evaluations aside from the electronic university-wide evaluations. There are two ways to send evaluations to students: Qualtrics and "Paper."
- Qualtrics accounts can be created using the link below. Once an account has been activated, you may use the site to create dynamic electronic evaluation scenarios which will allow you to run reports, create spreadsheets, and summarize the data.
- Paper Forms can be sent via email and returned to the faculty for summarizing.
- Curriculum Review details here: https://arr.usc.edu/services/curriculum/ospforms.html

Dean's Report - Due Every Year

- Director's Report and Evaluations Summary
- Settling Expenses: Settle within 30 days of return, Make sure to include details (who, what, when, where & how many) in your information.
Contacts:
Associate Dean Jane Cody          jmcody@college.usc.edu
Dean Andrew Stott                astott@usc.edu
Wendy Pedersen                   cook@dornsife.usc.edu
Business Office                  business@dornsife.usc.edu
Curriculum Office                curriclm@usc.edu
Registration                     regsched@usc.edu
Student Affairs                  jliebert@usc.edu
Health and Safety                njcolema@usc.edu